BrokerMetrics®
Enterprise

User Manual

June 2008

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Table of Contents

Access & Customization Features 4
Minimum System Requirements 4
Registration 4
Prerequisites 4
Procedure 5
Installation 6
Login 11
Preferences Menu 12
My Options 12
Financial 13
Goals 14
Monitor Performance 16
My Areas 17
New Saved Area 18
Rename a Saved Area 19
Modify a Saved Area 20
Delete a Saved Area 21
My Searches 22
New Search 23
Rename a Saved Search 25
Modify a Saved Search 26
Delete a Saved Search 26
Custom Market Share (CMS) Setup 27
Market Growth Office Setup (GIS) 30
Market Share Coverage Setup 31
My Enterprise 34
Status 34
Inventory 35
Enterprise Production 36
Office Production 37
Office Analysis 38
Overview 38
Operational Metrics 38
Inventory 40
Production 41
Measure Performance 42
Monitor Performance 43
Recruiting 44
Recruiting Search Screen 44
Agent Market Share 44
Office Search 45
Agent Name Search 46
Recruiting Search Results 48
Overview 48
Inventory 49
Production 50
Transaction Coverage 51
Measure Performance 52
Monitor Performance 53
Growth Analysis 54
Reports 55
Exports 55
Market Share Searches 56
Market Share Totals 56

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Search Screen 56
Search Results....58
Charts....59
Grid 60
Market Share Trends....61
12-Month Rolling Period View....61
Chart....61
Grid....62
Comparison Period Views....63
Charts 63
Grids 64
Market Share Coverage 65
Search Results....66
Chart 67
Grid 68
Market Growth 69
Market Growth Search Screen....69
Market Growth....71
Export....72
Office Growth 73
Export....74
Market Dynamics.... 75
Search Screen 75
Search Results....75
Chart Page 76
Chart Controls 76
Chart 77
Key Information 78
2 Year (Monthly) Information 78
6 Months (Weekly) Information 78
Grid Page 79
Tabs 79
Price 79
Supply & Demand....79
Sales Rate....79
Pricing Analysis 80
Pricing Analysis Search Screen....80
Results....81
Step #1 – Price Distribution 81
Step #2 – Sales Rate, Months Supply of Inventory and Pricing Window 82
Sales Rate and MSI (Months Supply of Inventory) 82
Pricing Window 82
Fine-tuning 82
Performance Management 84
Measure Performance 84
Monitor Performance....86
Exports 87

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Access & Customization Features

Minimum System Requirements

Before installing the BrokerMetrics® software or getting set up, it is important to ensure that your system meets the minimum requirements to operate the program, and that your PC is configured correctly.

1. Check with your system's administrator to confirm that your PC has the following:
   a. Pentium III processor (or more recent)
   b. Windows XP or Windows VISTA as its operating system
   c. At least 60Mb of available RAM
   d. At least 65Mb of Hard Disk Storage
   e. Internet Explorer 4.0 (or more recent) as its Browser

2. Confirm the appropriate screen resolution:
   f. The BrokerMetrics® program is best viewed with the screen resolution set at 1024 x 768.
   g. To confirm that your PC is set appropriately:
   h. Close (or minimize) all of your open programs and documents so that your desktop is in view.
   i. Right mouse-click on any open space on the desktop to display a menu, and then click on the **Properties** option.
   j. On the dialog box titled "Display Properties," click on the **Settings** tab at the top.
   k. In the lower left-hand corner you will see a moveable gauge titled "Screen Resolution." By depressing your left mouse button and holding it down over the arrow on the gauge, drag the arrow to adjust your monitor's screen resolution to 1024 X 768.
   l. Click on **Apply**. Your screen will go black for a moment as it resets. You may then be asked if you want to keep the new settings. Click on **Yes** and close out the dialog box

You are now ready to go through Registration.

Registration

After confirming that your system meets the minimum requirements and is configured appropriately, you must complete the BrokerMetrics® registration process.

Prerequisites

In order to complete the registration process you must::

1. Be at a PC on which you are going to use BrokerMetrics®.
2. Have access to the internet.
3. Have access to your email.
3. Have your BrokerMetrics® User Name and Password. If you have not received either a User Name or a Password, or if you have misplaced your User Name or Password, check with your Training Coordinator or call the Terradatum Hotline **1-888-212-4793 ext. 2**.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Procedure

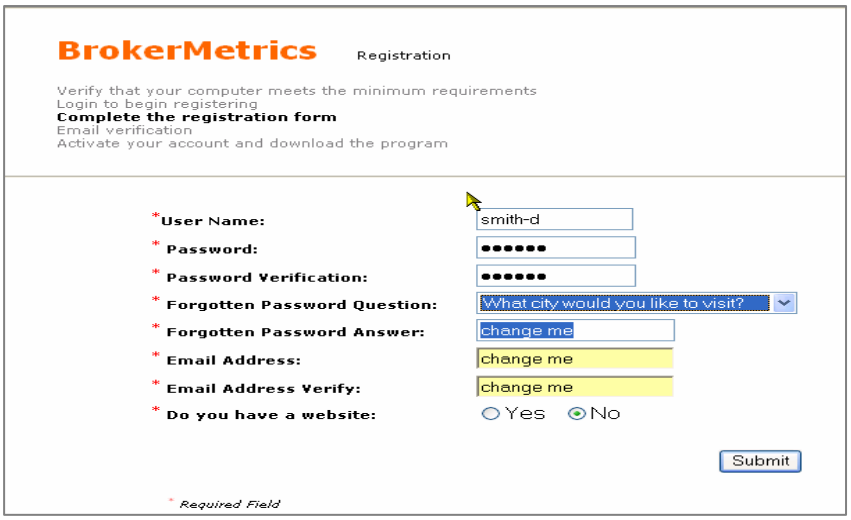
1. Start the registration process by opening your internet browser and typing in the following URL provided to you by your training coordinator. Have your BrokerMetrics® User Name and Password. If you have not received either a User Name or a Password, or if you have misplaced your User Name or Password, check with your Training Coordinator or call the Terradatum Hotline **1-888-212-4793 ext. 2**.

4. At the BrokerMetrics® registration page specifically designed for your firm, click on the BrokerMetrics® link.

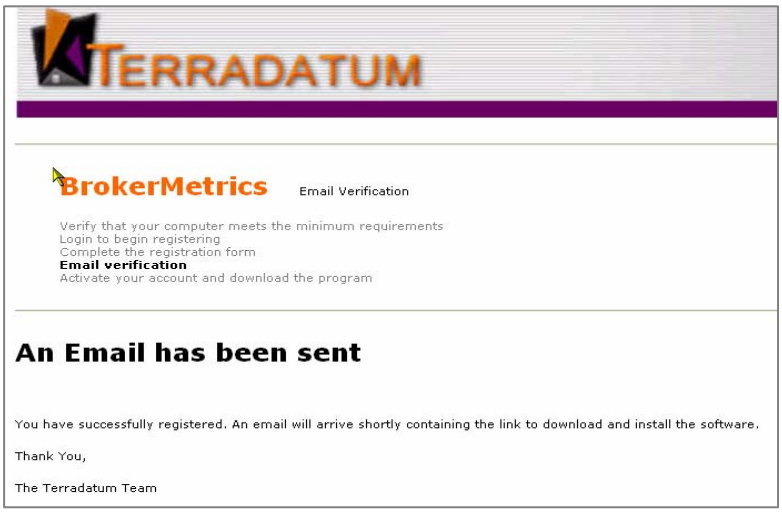
5. At the System Requirements page, click on **Continue** to go to the Login page.

6. Type in the User Name and Password you received, and click on **Login**.

7. You will now go to a registration page (see example below) and be asked to provide some basic information (e.g., challenge question and E-mail address). Fill in the required fields and click on **Submit**.



8. The Registration form will cause the BrokerMetrics® system to generate an email to you.

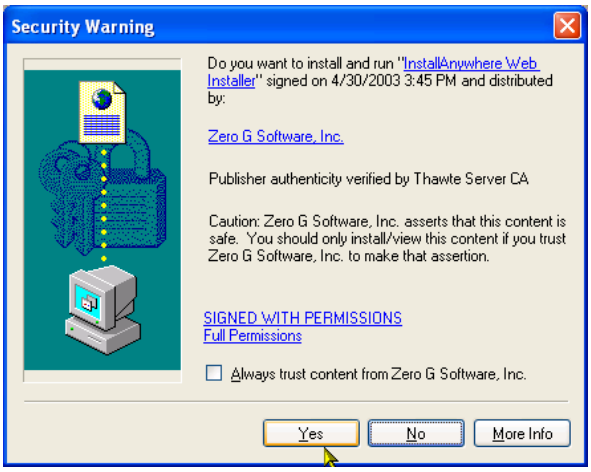

TERRADATUM
BrokerMetrics
Email Verification
Verify that your computer meets the minimum requirements
Login to begin registering
Complete the registration form
Email verification
Activate your account and download the program
An Email has been sent
You have successfully registered. An email will arrive shortly containing the link to download and install the software.
Thank You,
The Terradatum Team

9. When you receive the email, click on the link in the message to begin the installation process.

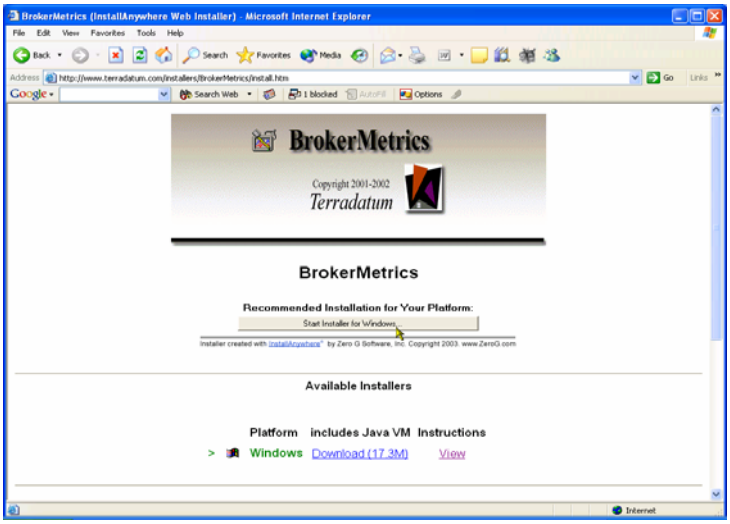
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Installation

1. Clicking on the link in the email will bring up a “Security Warning” dialog box. Click on **Yes**.

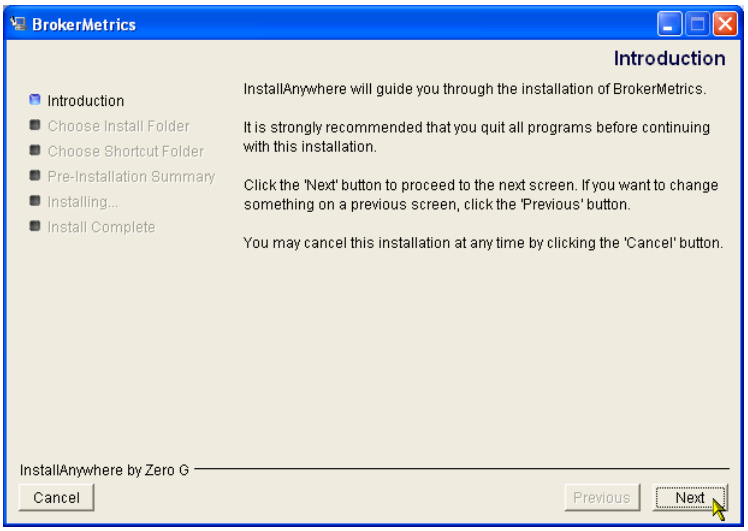

Security Warning
Do you want to install and run "InstallAnywhere Web Installer" signed on 4/30/2003 3:45 PM and distributed by:
Zero G Software, Inc.
Publisher authenticity verified by Thawte Server CA
Caution: Zero G Software, Inc. asserts that this content is safe. You should only install/view this content if you trust Zero G Software, Inc. to make that assertion.
SIGNED WITH PERMISSIONS
Full Permissions
Always trust content from Zero G Software, Inc.
Yes
No
More Info

2. Click on **Start Installer for Windows** to begin the installation process, which may take a few moments.

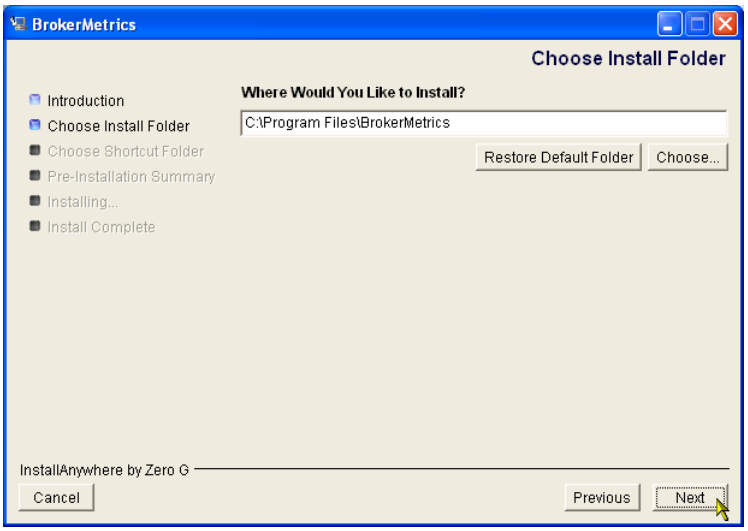


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

3. Click on **Next**.

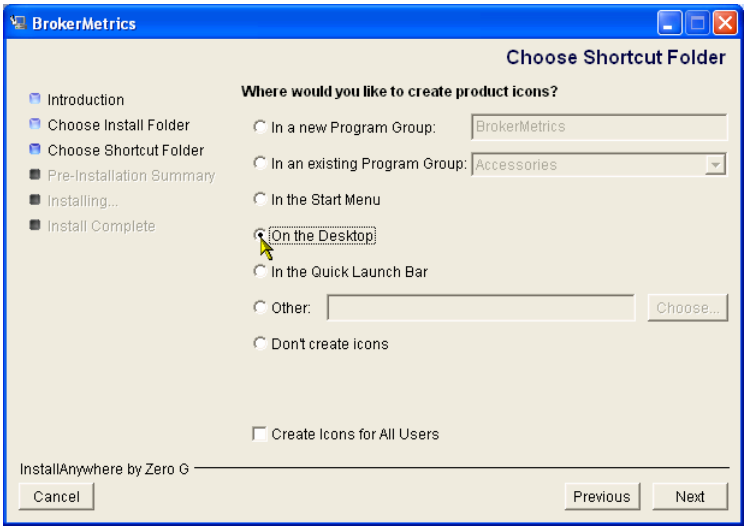

BrokerMetrics
Introduction
Introduction
Choose Install Folder
Choose Shortcut Folder
Pre-Installation Summary
Installing...
Install Complete
InstallAnywhere will guide you through the installation of BrokerMetrics.
It is strongly recommended that you quit all programs before continuing with this installation.
Click the 'Next' button to proceed to the next screen. If you want to change something on a previous screen, click the 'Previous' button.
You may cancel this installation at any time by clicking the 'Cancel' button.
InstallAnywhere by Zero G
Cancel
Previous
Next

4. Click on **Next**.

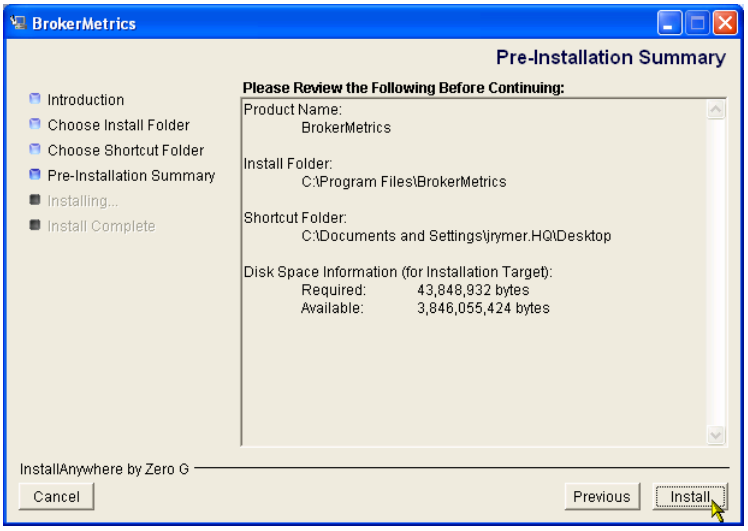


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

5. Click the **On the Desktop** radio button, then, click **Next**.

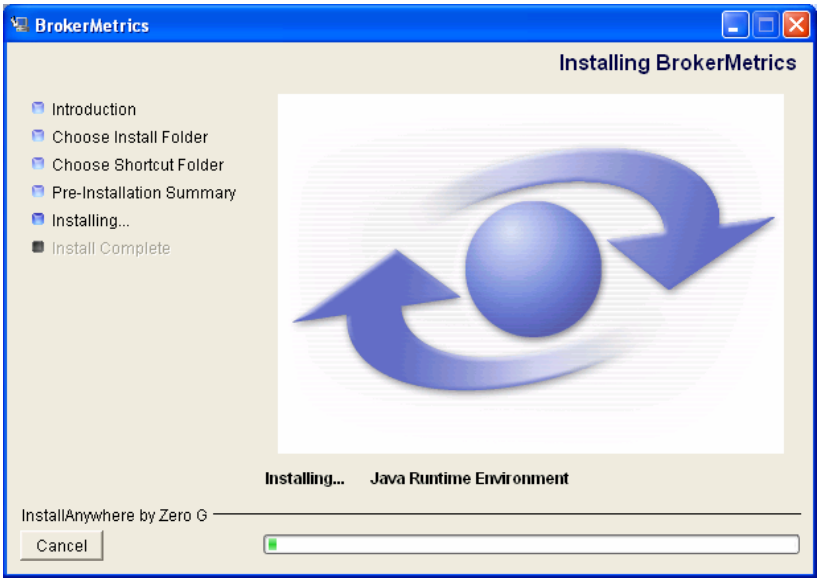


6. Click on **Install**.

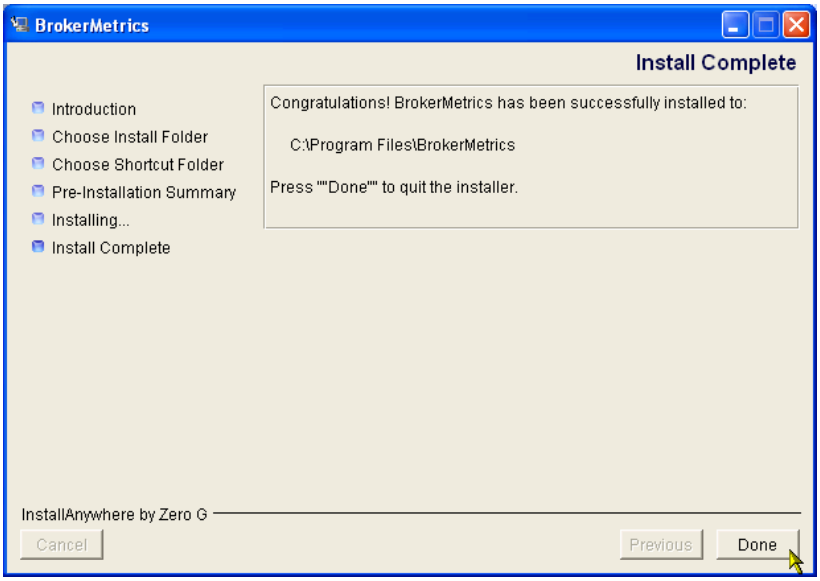


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

7. Wait for the installation to complete; this will take a few moments.

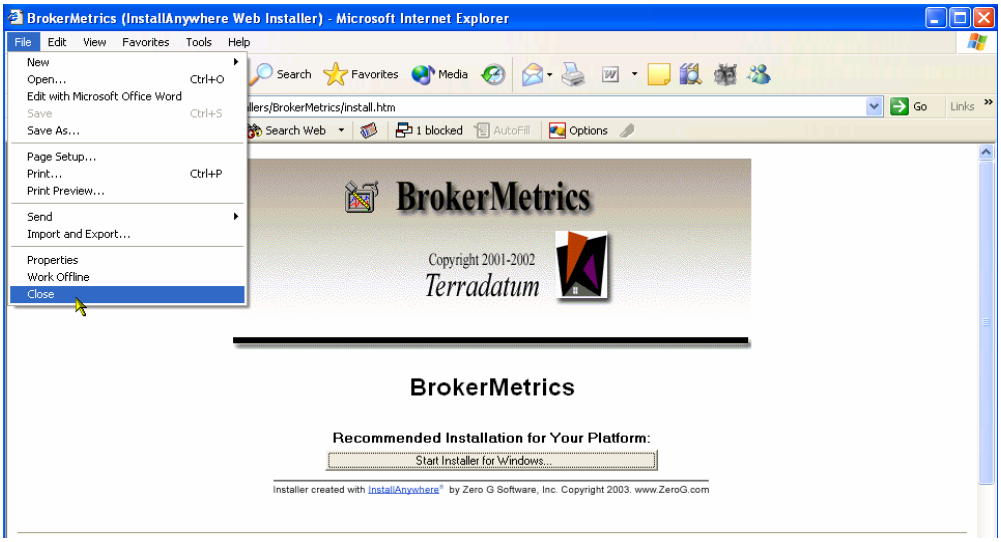


8. Click on **Done**.



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

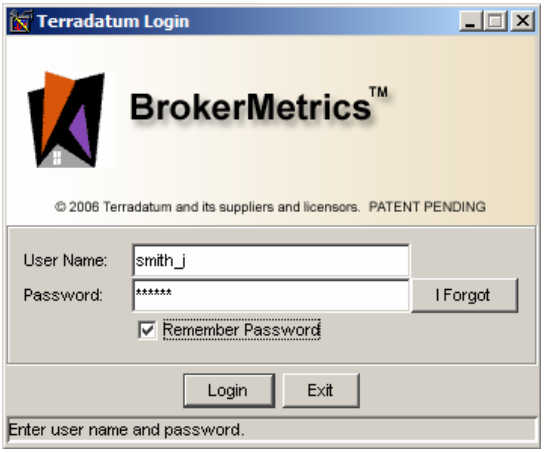
9. Finish by closing your browser.



Congratulations!
You are now ready to log in and begin using BrokerMetrics® !

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Login



1. Once BrokerMetrics® has been installed properly, double-click on the BrokerMetrics® icon on your desktop to open the program.
2. Enter your User Name and Password and click the **Login** button

You may install BrokerMetrics® on all necessary computers, i.e. where you do your real estate work (home, office, laptop)

BrokerMetrics® recognizes each user based on their unique ID and Password, and displays the appropriate views for each user's role.

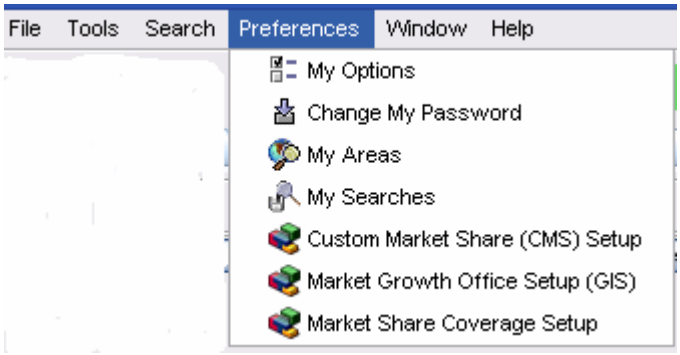
The system is dynamic and updated daily so there can be small data variances over time (e.g. pending to sold status changes will always add market share to the applicable COE date).

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Preferences Menu

Where data input and customization begin….

BrokerMetrics® allows the user to input key office/company data and personalize various system configurations. Please take the time to familiarize yourself with these functions. They will pay many long-term dividends from a program "power" and "ease-of-use" perspective.



The next several pages will guide you through the process of setting up:

- **My Options**
  - Input proprietary financial information
  - Input company goals & objectives
- **My Areas**
  - Customize MLS system geographies
- **My Searches**
  - Create and save searches
- **Custom Market Share (CMS) Setup**
  - Integrate your personal market information into the market share tools
- **Market Growth Office Setup (GIS)**
  - Create groups of offices so you can track their growth
- **Market Share Coverage Setup**
  - Define your market service area and identify your prime competitors for real-time comparison tracking.

My Options

Key office/company information is input here.

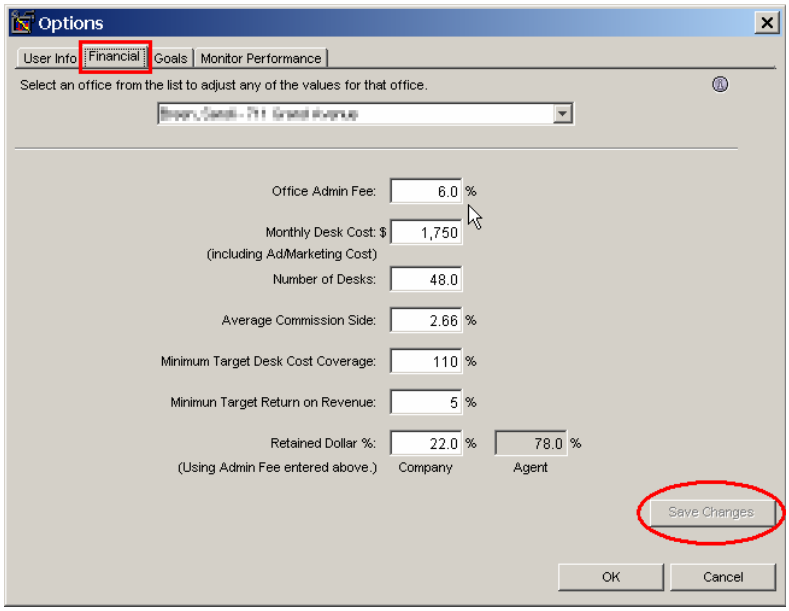
We will review three tabs in My Options:

- **Financial Tab**
- **Goals Tab**
- **Monitor Performance Tab**

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Financial

This information is integrated into various tools (see below) throughout the program; it is usually obtained from management reports and/or your CFO.


Options
User Info
Financial
Goals
Monitor Performance
Select an office from the list to adjust any of the values for that office.
Office Admin Fee: 6.0 %
Monthly Desk Cost: $ 1,750
(including Ad/Marketing Cost)
Number of Desks: 48.0
Average Commission Side: 2.66 %
Minimum Target Desk Cost Coverage: 110 %
Minimun Target Return on Revenue: 5 %
Retained Dollar %: 22.0 % 78.0 %
(Using Admin Fee entered above.) Company Agent
Save Changes
OK
Cancel

1. Place mouse cursor in input box and type the desired value.
2. Tab to move between fields or to leave a field (this activates the Save Changes button).
3. When all desired values have been entered, click on the Save Changes button.

Metrics and Ratios used on the Financial Tab:

Office Admin Fee
The percentage "administration fee" that the company deducts from the total commission (Gross Commission Income or GCI) before they split with the agents. The user needs to input the appropriate figure into the system so that the Net $ calculations in Performance Management are as accurate as possible.

Monthly Desk Cost
Reflects the total operating expenses of the office or company on a monthly per desk basis.

Number of Desks
The total number of desks that the office/company uses for expense amortization purposes.

Average Commission Side
This is the office/company's true commission percentage (per transaction side) after all deal "concessions" have been made. It is obtained from company and/or office financial records.

Minimum Target Desk Cost Coverage
The breakeven point where the firm's revenues exactly equal its expenses. The default setting is 100% indicating this "breakeven" point between revenues and expenses.

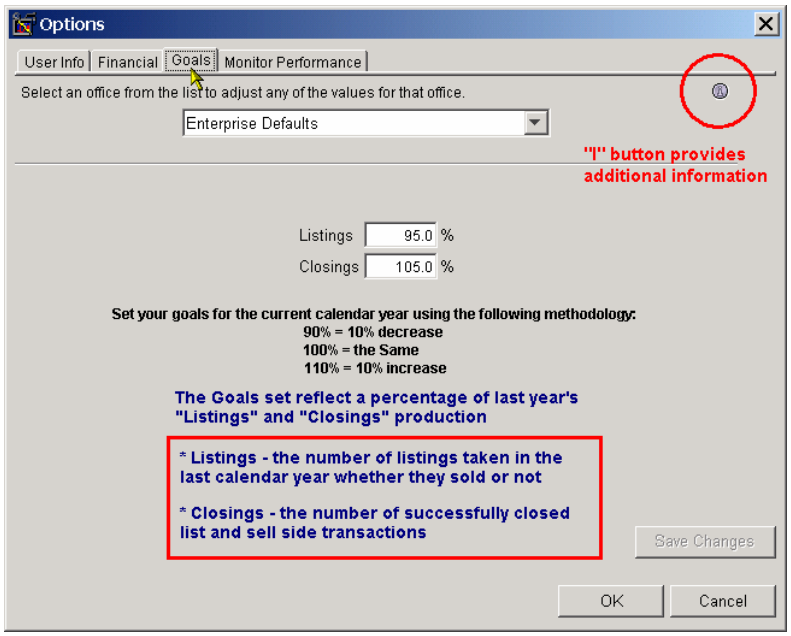
Minimum Target Return on Revenue
The target set by the firm for its return goal, i.e. net income/GCI . The default setting is 0% indicating the "breakeven" point (no profit or loss).

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Retained Dollar % (Company Dollar / GCI)
The ratio of Company $ compared to GCI as a percentage. Company dollar is usually comprised of two components; the admin fee taken off the top of the total GCI received; and then the office/company side of the commission splits with the agents.

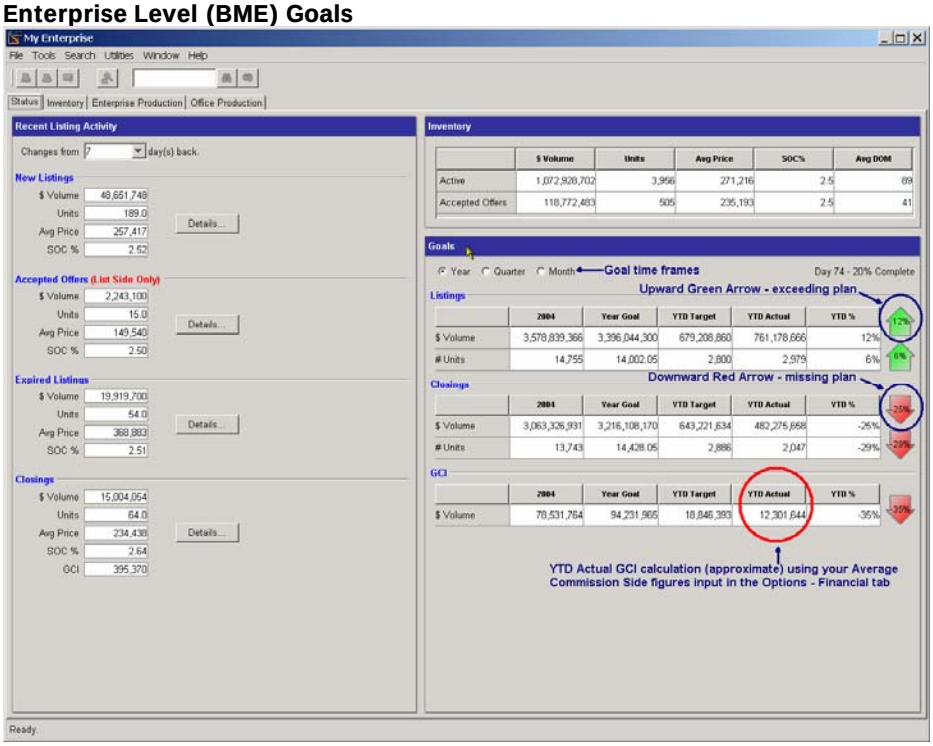
Goals

Allows for the input of yearly production goals (as a percentage of last year's actuals). The goals section of BrokerMetrics® will then display compliance information and provides measurements vs. previous times (year, quarter, and month). The default setting for this tab will be filled in. You can adjust the targets to see the impact of different goals on your financials.


Options
User Info
Financial
Goals
Monitor Performance
Select an office from the list to adjust any of the values for that office.
Enterprise Defaults
"I" button provides additional information
Listings 95.0 %
Closings 105.0 %
Set your goals for the current calendar year using the following methodology:
90% = 10% decrease
100% = the Same
110% = 10% increase
The Goals set reflect a percentage of last year's "Listings" and "Closings" production
* Listings - the number of listings taken in the last calendar year whether they sold or not
* Closings - the number of successfully closed list and sell side transactions
Save Changes
OK
Cancel

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Enterprise Level (BME) Goals

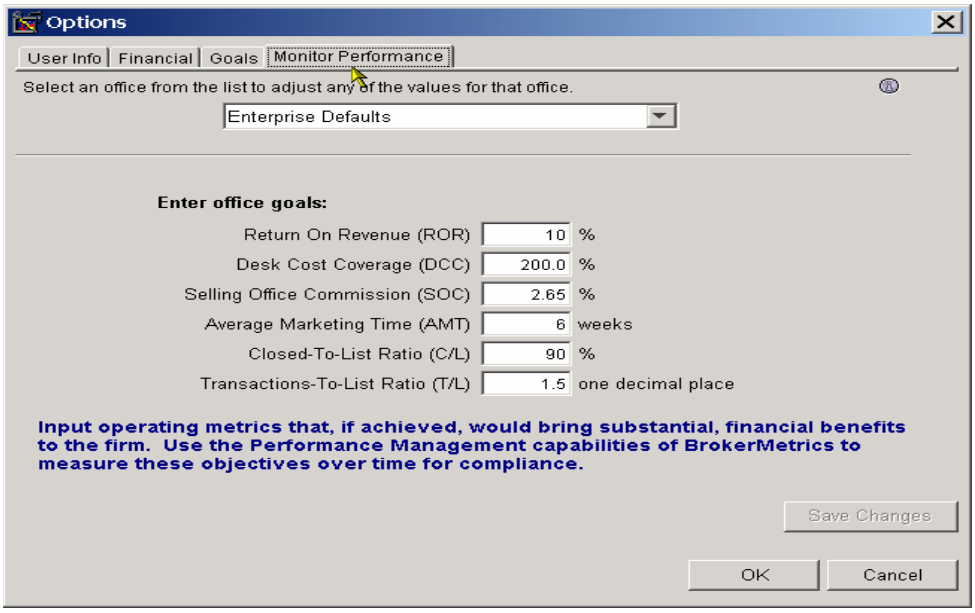

Goal time frames
Upward Green Arrow - exceeding plan
Downward Red Arrow - missing plan
YTD Actual GCI calculation (approximate) using your Average Commission Side figures input in the Options - Financial tab

- Current performance can be measured against last year's performance and this year's goals & objectives.
- Arrow icons give the user at-a-glance information as to whether performance is meeting plan or not. An upward green arrow signifies that performance is exceeding the plan and a red downward arrow the opposite.
- A YTD "Actual" GCI calculation is performed. It is approximate to the extent that it only reflects MLS transactions and the commission amount used in the calculation is from the Options – Financial information.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Monitor Performance

This is where company goals and objectives are input into the BrokerMetrics® system. These are the key operating metrics that will be measured and closely tracked throughout the system, i.e. agent analysis; office analysis; enterprise analysis; recruiting, etc. They are chosen because small improvements to these metrics pay large dividends to the company's bottom line.


Options
User Info
Financial
Goals
Monitor Performance
Select an office from the list to adjust any of the values for that office.
Enterprise Defaults
Enter office goals:
Return On Revenue (ROR) 10 %
Desk Cost Coverage (DCC) 200.0 %
Selling Office Commission (SOC) 2.65 %
Average Marketing Time (AMT) 6 weeks
Closed-To-List Ratio (C/L) 90 %
Transactions-To-List Ratio (T/L) 1.5 one decimal place
Input operating metrics that, if achieved, would bring substantial, financial benefits to the firm. Use the Performance Management capabilities of BrokerMetrics to measure these objectives over time for compliance.
Save Changes
OK
Cancel

Metrics and Ratios in the Monitor Performance Tab:

Return on Revenue (ROR)
Percentage of GCI revenue that is "Net $" to the company after all commissions and expenses have been paid. The breakeven point of (0%) is input through the Financial tab. It is the most direct measure of the overall operational efficiency.

Desk Cost Coverage (DCC)
Measures gross profit vs. gross expense as a percentage. The breakeven point of 100% is input through the Financial tab.

Selling Office Commission (SOC)
The average commission offered to co-operating brokers. The list side commission is then inferred by local custom, e.g. if 6% commissions are the market custom and the cooperating broker is being offered 3%, then the listing broker is probably getting 3% as well.

Average Marketing Time (AMT)
Measures the average number of weeks that the office/company needs to expend marketing dollars on any given listing (on average) before they go under contract or expire.

Closed-to-List Ratio (C/L)
Measures the number of listings that successfully close relative to the number that were taken (over the last 12 complete months) on a percentage basis.

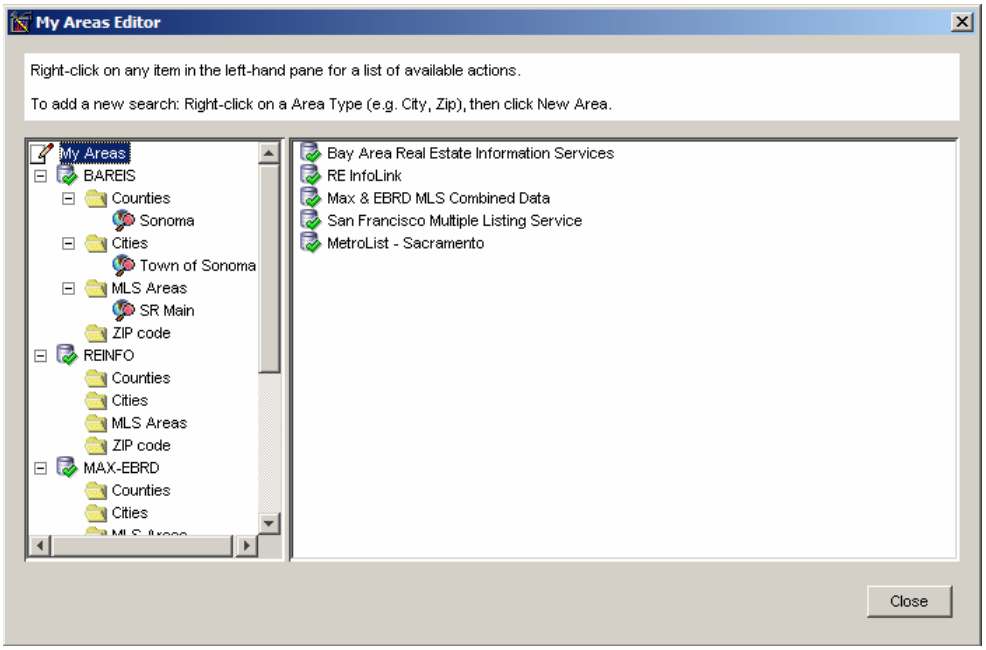
Transaction-to-List Ratio (T/L)
Measures the total # of closed transactions versus the # of listings that were taken (over the last 12 complete months) on a percentage basis.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

My Areas

Create and save groups of areas (cities, counties, MLS areas and zip codes) to be displayed in the area pick-lists on all search screens. This feature lessens the need to hunt-and-peck through the long lists of areas that are contained in most large, regional MLS systems.

Click on **My Areas** on the Preferences menu to display this window:



The left side will list:

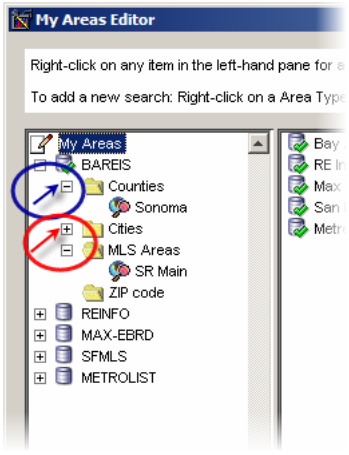
Each **MLS** you are authorized to access; within each MLS will be a folder for:

Area Types available for each MLS; under each Area Type will be the:

Saved Areas (if any) you have created for each Area Type.

All folders and lists will be expanded when the window is opened.

Click on the minus sign next to a folder to collapse it (hide its contents); click on the plus sign to display the contents:

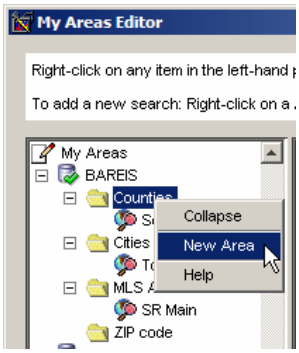


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

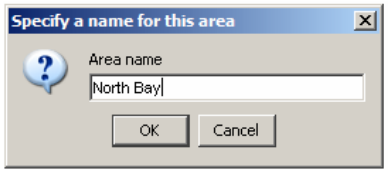
New Saved Area

New Saved Area – Preferences Menu

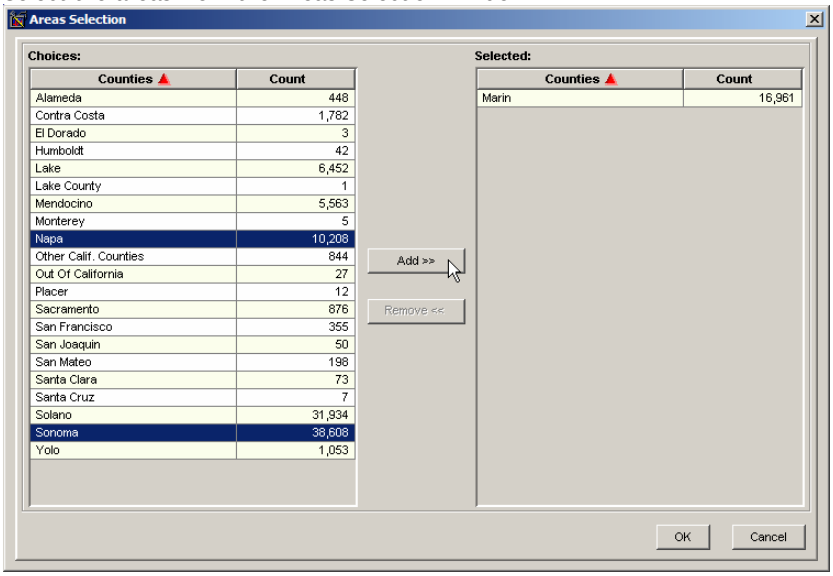
Click on **My Areas** on the Preferences Menu.
Right-click on an Area Type and click on **New Area**:



Enter a name for your area and click **OK**:

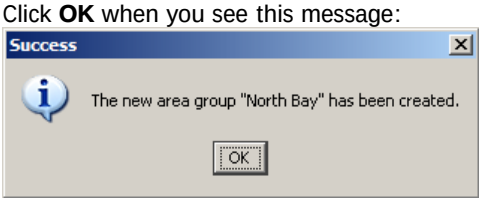


Select the areas from the Areas Selection window:



- Click on a row or multiple rows (using Shift-Click or Ctrl-Click), then on **Add**, or
- Double-click on a row to move the selection to the Selected pane.
- Click **OK.**

Click **OK** when you see this message:

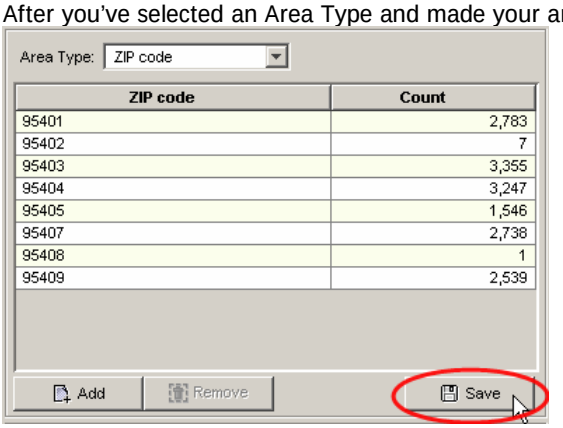


The new saved area will be listed in the Area Type picklist on all search screens.

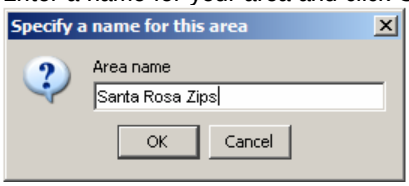
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

New Saved Area - Search Screen

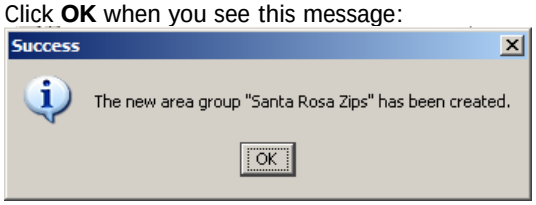
After you've selected an Area Type and made your area selections on any search screen, click on the **Save** button:



Enter a name for your area and click **OK**:



Click **OK** when you see this message:

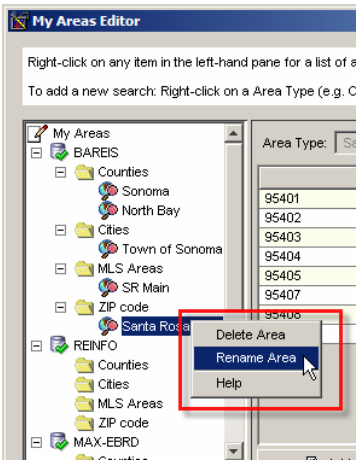


The new saved area will be listed in the Area Type picklist on all search screens.

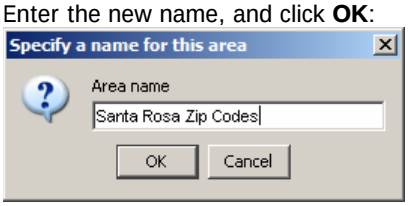
To make changes to a Saved Area, right-click on the Area Name, then on **Delete** or **Rename**.
To add or remove selections included in the Saved Area, click on the **Add** or **Remove** buttons.

Rename a Saved Area

Click on **My Areas** on the Preferences Menu.
Right-click on the saved area you wish to rename and click on **Rename Area**:



Enter the new name, and click **OK**:

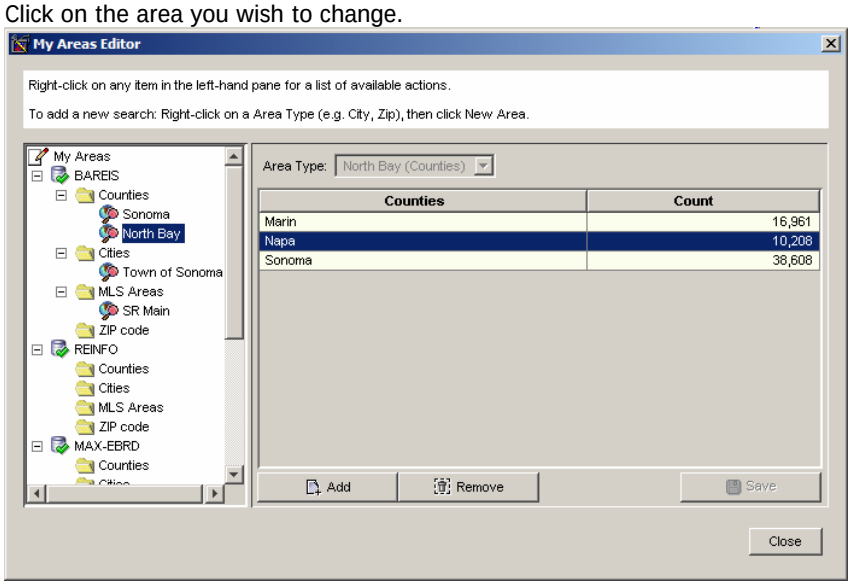


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Modify a Saved Area

Modify Saved Areas – Preferences Menu

Click on **My Areas** on the Preferences Menu.
Click on the area you wish to change.

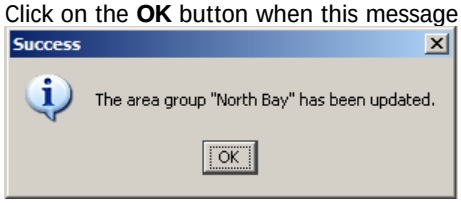


Make the desired changes:

Click on a row, then on **Remove** to delete the area from the group, and/or
Click on **Add** to display the Area Selection window.

Be sure to click the **Save** button when you've completed the modifications to the saved area.

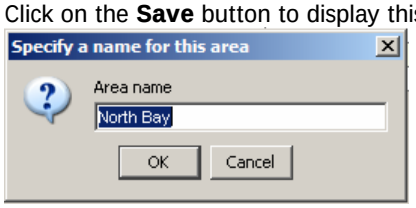
Click on the **OK** button when this message is displayed:



Modify Saved Areas – Search Screen

After a saved area has been selected on a search screen, changing any of the selected areas will activate the **Save** button.

Click on the **Save** button to display this window:

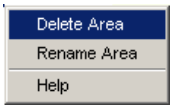


You may either click **OK** to save the revised areas under the same name, or enter a different name to save the revised areas as a new group (the "old" group will remain intact, with the original set of areas).

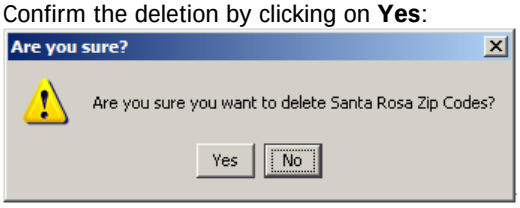
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Delete a Saved Area

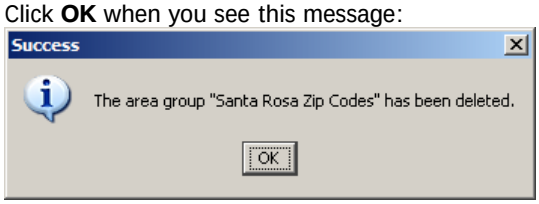
Click on **My Areas** on the Preferences Menu.
Right-click on the saved area you wish to delete and click on **Delete Area**:



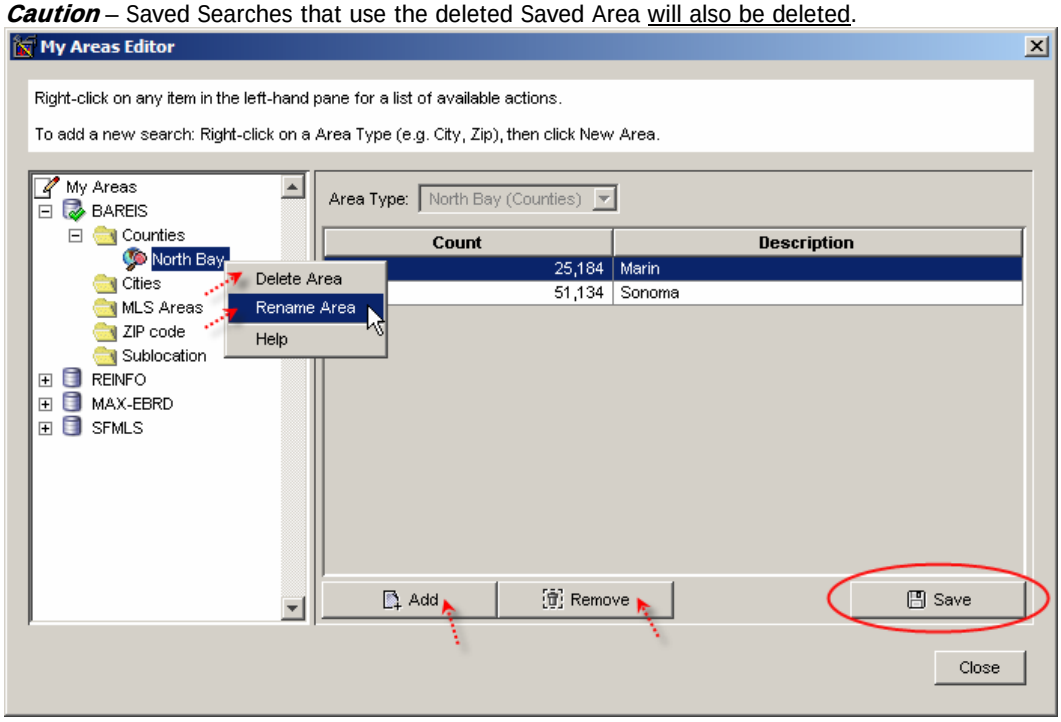
Confirm the deletion by clicking on **Yes**:



Click **OK** when you see this message:



Caution – Saved Searches that use the deleted Saved Area will also be deleted.



Be sure to click on the* Save *button before closing the editor.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

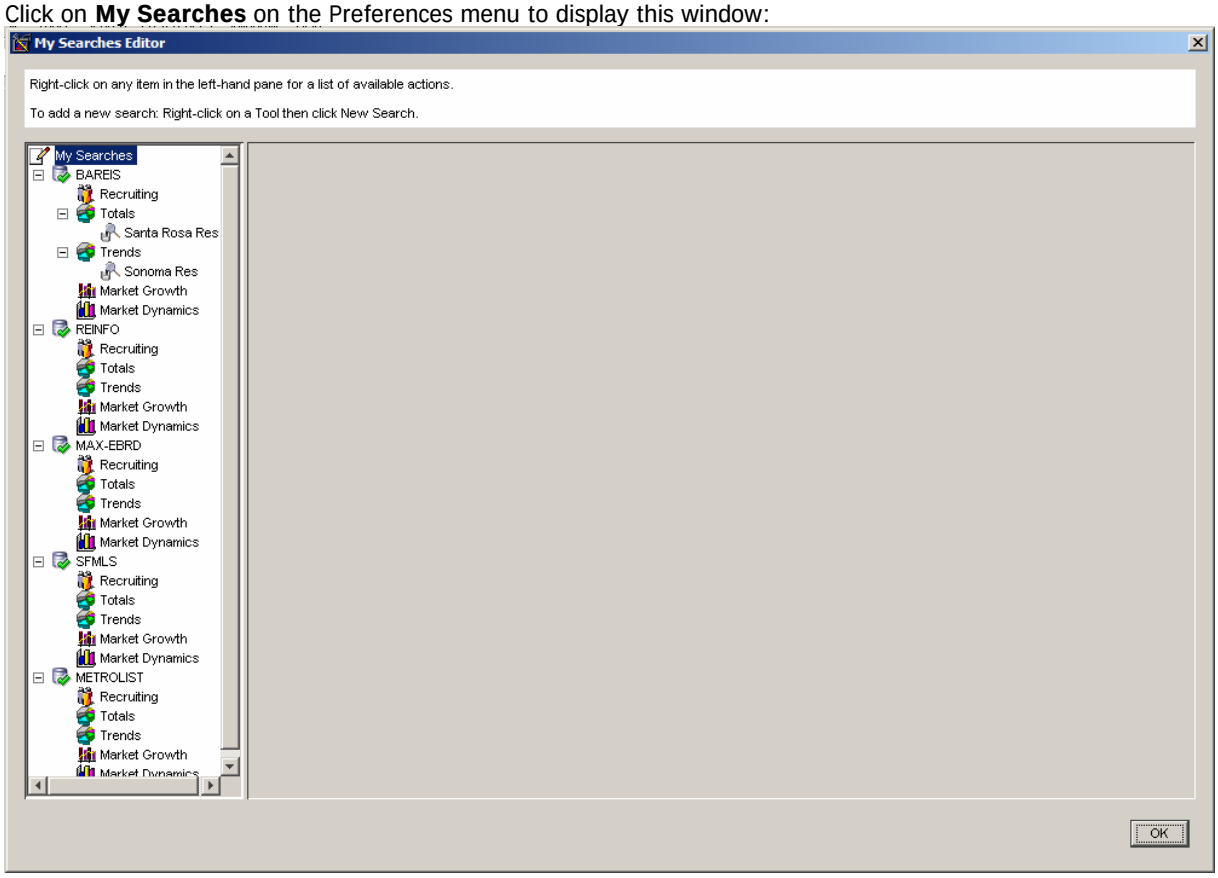
My Searches

Use this feature to create saved searches for the following tools:

Recruiting (Agent Market Share)
Market Share Totals
Market Share Trends
Market Growth
Market Dynamics

Searches may also be saved from the search screens; instructions for both methods are included below.

Click on **My Searches** on the Preferences menu to display this window:



The left pane will list:

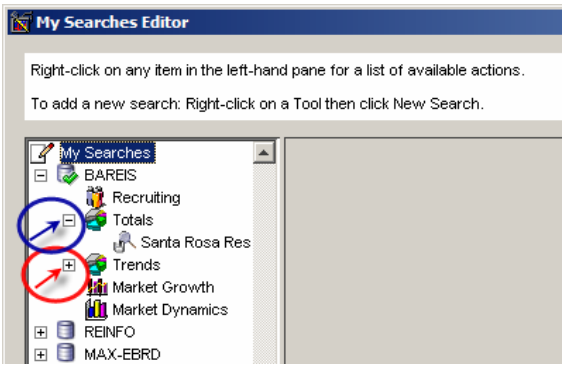
The **MLS**'s you are authorized to access; within each MLS will be a folder for:

The **Tools** you (or your company) have subscribed to that utilize the search function; under each tool will be the:

Saved searches (if any) you have created for each tool.

All folders and lists will be expanded when the window is opened.

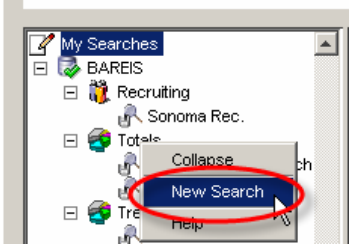
Click on the minus sign next to a MLS name or tool name to collapse the list (hide its contents); click on the plus sign to display the list:



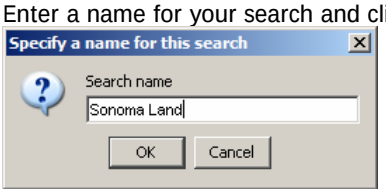
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

New Search

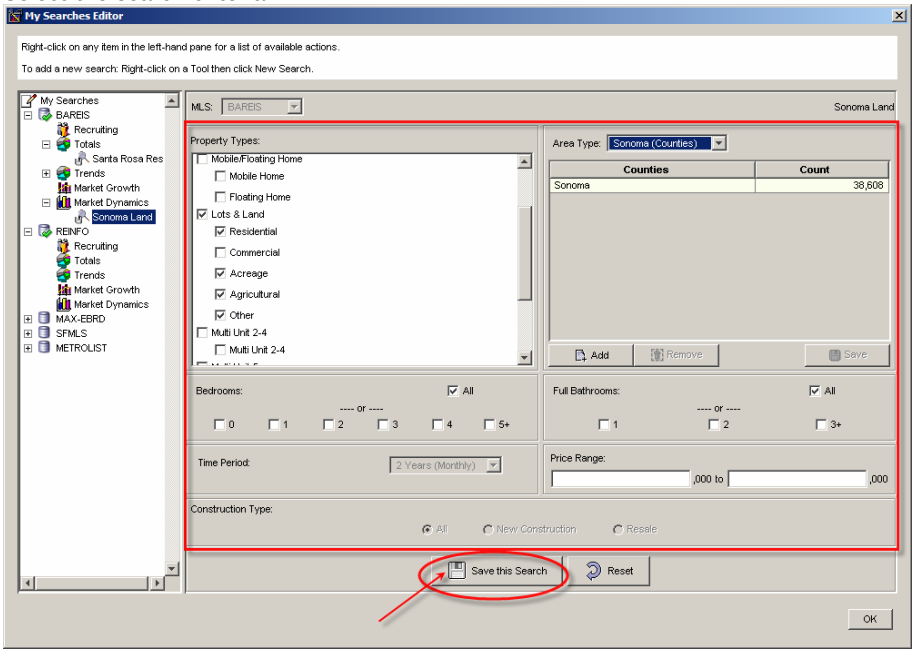
Click on **My Searches** on the Preferences Menu.
Right-click on a Tool and click on **New Search**:



Enter a name for your search and click **OK**:



Select the search criteria:

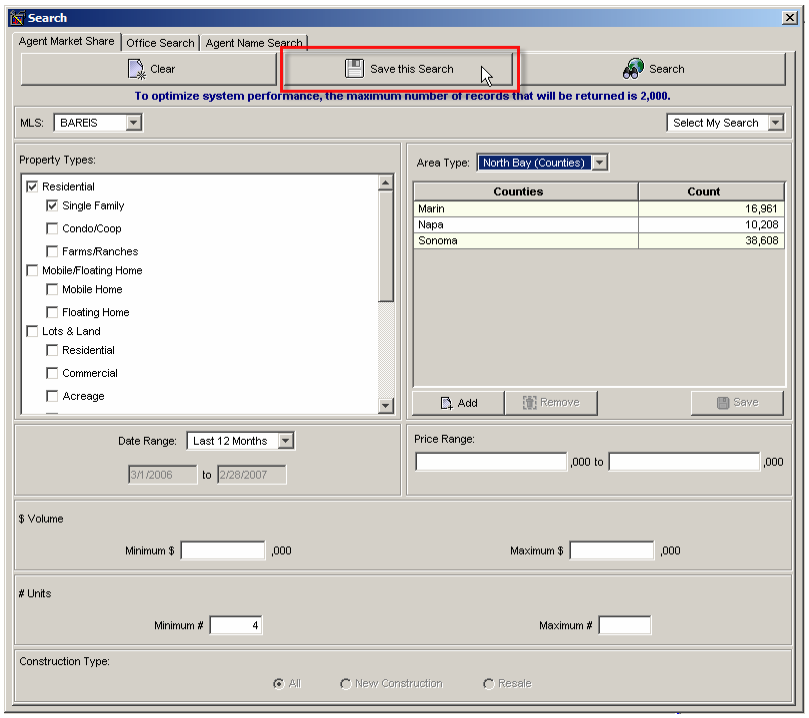


Then click on **Save this Search**.

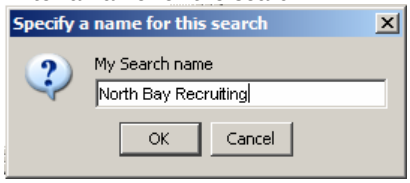
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

New Search - Search Screen

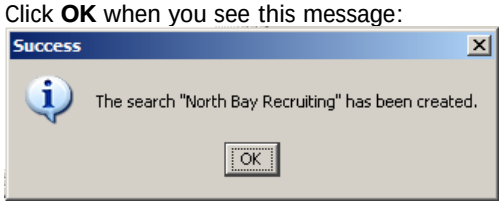
After you've selected the desired criteria (Property Types and Areas must be selected), click on the **Save this Search** button at the top of the window:



Enter a name for the search:



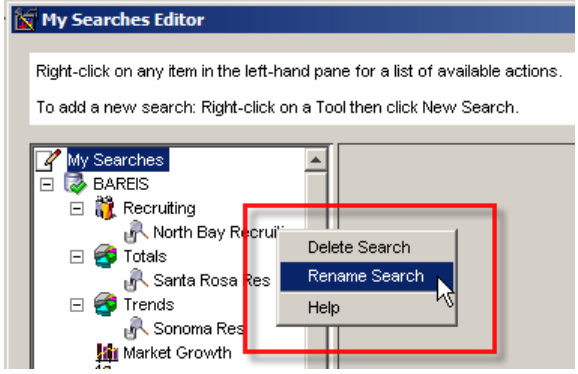
Click **OK** when you see this message:



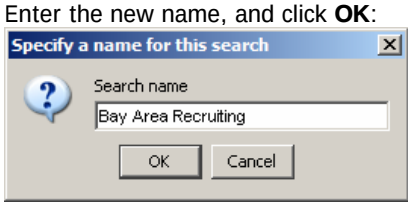
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Rename a Saved Search

Click on **My Searches** on the Preferences Menu.
Right-click on the saved search you wish to rename and click on **Rename Search**:



Enter the new name, and click **OK**:



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

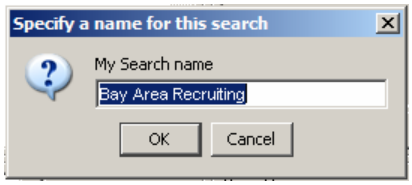
Modify a Saved Search

Click on **My Searches** on the Preferences Menu.
Click on the search you wish to change.
Click on the **Save this Search** button at the bottom of the window.

Click on the **OK** button when this message is displayed:

Modify a Saved Search – Search Screen

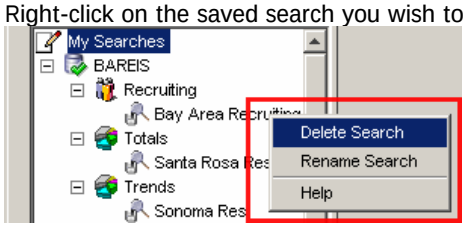
After a saved search has been selected on a search screen, changing any of the criteria will activate the **Save this Search** button. Click on the button to display this window:



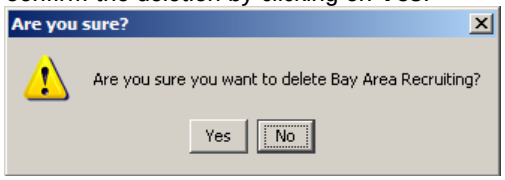
You may either click **OK** to save the revised criteria under the same name, or enter a different name to save the revised criteria as a new search (the "old" search will remain intact, with the original set of criteria).

Delete a Saved Search

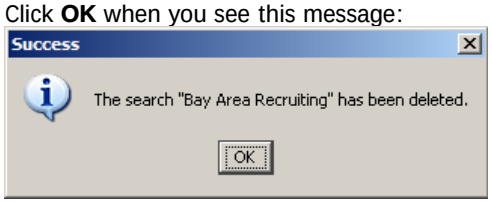
Click on **My Searches** on the Preferences Menu.
Right-click on the saved search you wish to delete and click on **Delete Search**:



Confirm the deletion by clicking on **Yes**:



Click **OK** when you see this message:

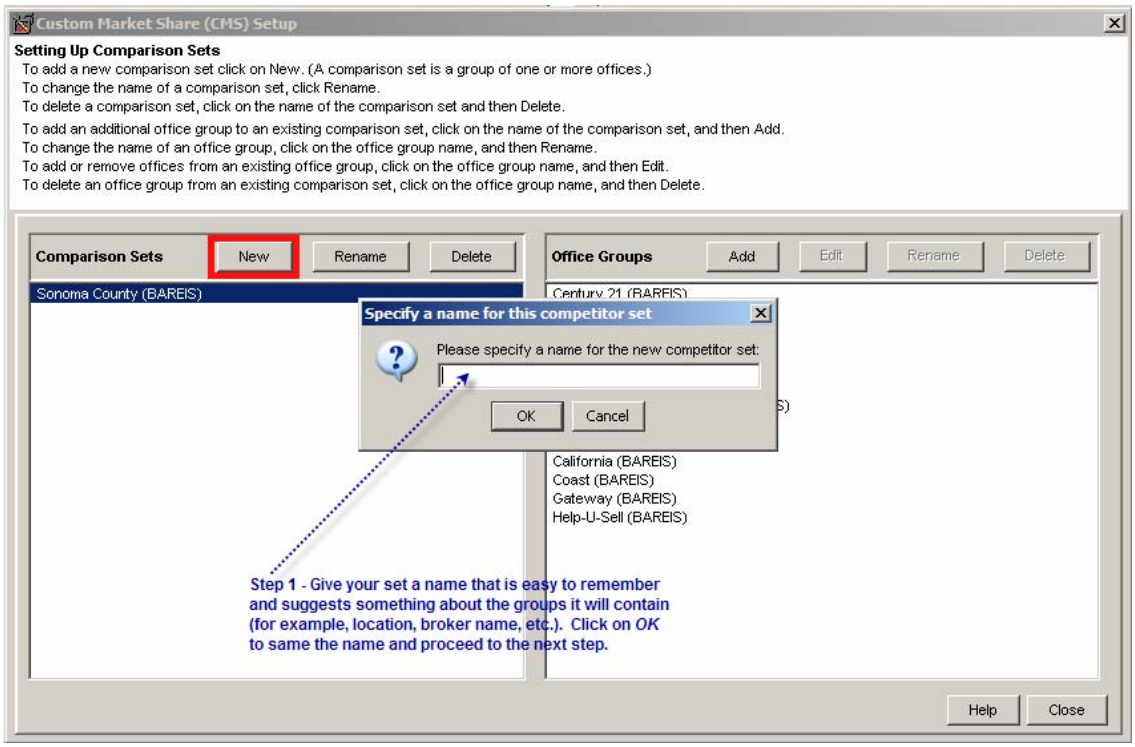


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Custom Market Share (CMS) Setup

This utility allows you to set up and customize comparison sets of competitors to use in the Market Share tool for market analysis purposes.
Comparison sets are groups of competitors.
Competitors are groups of one or more offices. For example, you might wish to compare the offices of XYZ agency in Napa with the offices of ABC agency and DEF agency in Napa. You would first create a Competitor Set Called Napa, and then set up three competitor groups called ABC, DEF and XYZ.

Step 1
Click the **New** tab and type in an easy-to-remember name for the group you are defining. Then click the **OK** button to create the set.

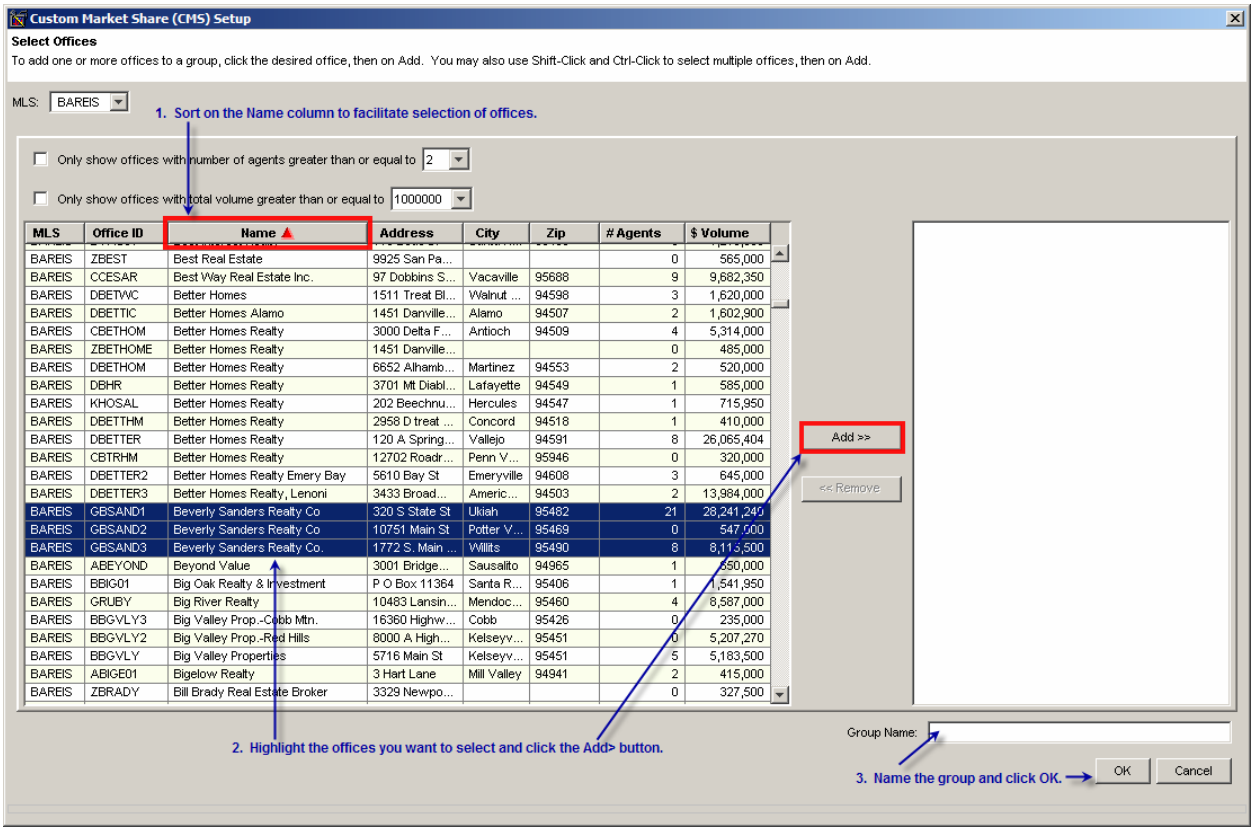

Custom Market Share (CMS) Setup
Setting Up Comparison Sets
To add a new comparison set click on New. (A comparison set is a group of one or more offices.)
To change the name of a comparison set, click Rename.
To delete a comparison set, click on the name of the comparison set and then Delete.
To add an additional office group to an existing comparison set, click on the name of the comparison set, and then Add.
To change the name of an office group, click on the office group name, and then Rename.
To add or remove offices from an existing office group, click on the office group name, and then Edit.
To delete an office group from an existing comparison set, click on the office group name, and then Delete.
Comparison Sets
New
Rename
Delete
Office Groups
Add
Edit
Rename
Delete
Sonoma County (BAREIS)
Century 21 (BAREIS)
Specify a name for this competitor set
Please specify a name for the new competitor set:
OK
Cancel
California (BAREIS)
Coast (BAREIS)
Gateway (BAREIS)
Help-U-Sell (BAREIS)
Step 1 - Give your set a name that is easy to remember and suggests something about the groups it will contain (for example, location, broker name, etc.). Click on OK to same the name and proceed to the next step.
Help
Close

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Step 2

Select the offices for the group; name and save the group.

1. Sort on the name column to group like-named offices together.
2. Choose the desired offices and move them to the right (double-click the row, or click the row and then click the **Add>** button).
3. Name the group and click on **OK**. The first group is now complete.


Custom Market Share (CMS) Setup
Select Offices
To add one or more offices to a group, click the desired office, then on Add. You may also use Shift-Click and Ctrl-Click to select multiple offices, then on Add.
MLS: BAREIS
1. Sort on the Name column to facilitate selection of offices.
Only show offices with number of agents greater than or equal to 2
Only show offices with total volume greater than or equal to 1000000
MLS | Office ID | Name | Address | City | Zip | # Agents | $ Volume
BAREIS | ZBEST | Best Real Estate | 9925 San Pa... | | | 0 | 565,000
BAREIS | CCESAR | Best Way Real Estate Inc. | 97 Dobbins S... | Vacaville | 95688 | 9 | 9,682,350
BAREIS | DBETWC | Better Homes | 1511 Treat Bl... | Walnut ... | 94598 | 3 | 1,620,000
BAREIS | DBETTIC | Better Homes Alamo | 1451 Danville... | Alamo | 94507 | 2 | 1,602,900
BAREIS | CBETHOM | Better Homes Realty | 3000 Delta F... | Antioch | 94509 | 4 | 5,314,000
BAREIS | ZBETHOME | Better Homes Realty | 1451 Danville... | | | 0 | 485,000
BAREIS | DBETHOM | Better Homes Realty | 6652 Alhamb... | Martinez | 94553 | 2 | 520,000
BAREIS | DBHR | Better Homes Realty | 3701 Mt Diabl... | Lafayette | 94549 | 1 | 585,000
BAREIS | KHOSAL | Better Homes Realty | 202 Beechnu... | Hercules | 94547 | 1 | 715,950
BAREIS | DBETTHM | Better Homes Realty | 2958 D treat ... | Concord | 94518 | 1 | 410,000
BAREIS | DBETTER | Better Homes Realty | 120 A Spring... | Vallejo | 94591 | 8 | 26,065,404
BAREIS | CBTRHM | Better Homes Realty | 12702 Roadr... | Penn V... | 95946 | 0 | 320,000
BAREIS | DBETTER2 | Better Homes Realty Emery Bay | 5610 Bay St | Emeryville | 94608 | 3 | 645,000
BAREIS | DBETTER3 | Better Homes Realty, Lenoni | 3433 Broad... | Americ... | 94503 | 2 | 13,984,000
BAREIS | GBSAND1 | Beverly Sanders Realty Co | 320 S State St | Ukiah | 95482 | 21 | 28,241,249
BAREIS | GBSAND2 | Beverly Sanders Realty Co | 10751 Main St | Potter V... | 95469 | 0 | 547,500
BAREIS | GBSAND3 | Beverly Sanders Realty Co. | 1772 S. Main ... | Willits | 95490 | 8 | 8,113,500
BAREIS | ABEYOND | Beyond Value | 3001 Bridge... | Sausalito | 94965 | 1 | 550,000
BAREIS | BBIG01 | Big Oak Realty & Investment | P O Box 11364 | Santa R... | 95406 | 1 | 1,541,950
BAREIS | GRUBY | Big River Realty | 10483 Lansin... | Mendoc... | 95460 | 4 | 8,587,000
BAREIS | BBGVLY3 | Big Valley Prop.-Cobb Mtn. | 16360 Highw... | Cobb | 95426 | 0 | 235,000
BAREIS | BBGVLY2 | Big Valley Prop.-Red Hills | 8000 A High... | Kelseyv... | 95451 | 0 | 5,207,270
BAREIS | BBGVLY | Big Valley Properties | 5716 Main St | Kelseyv... | 95451 | 5 | 5,183,500
BAREIS | ABIGE01 | Bigelow Realty | 3 Hart Lane | Mill Valley | 94941 | 2 | 415,000
BAREIS | ZBRADY | Bill Brady Real Estate Broker | 3329 Newpo... | | | 0 | 327,500
Add >>
<< Remove
2. Highlight the offices you want to select and click the Add> button.
Group Name:
3. Name the group and click OK.
OK
Cancel

Tips:

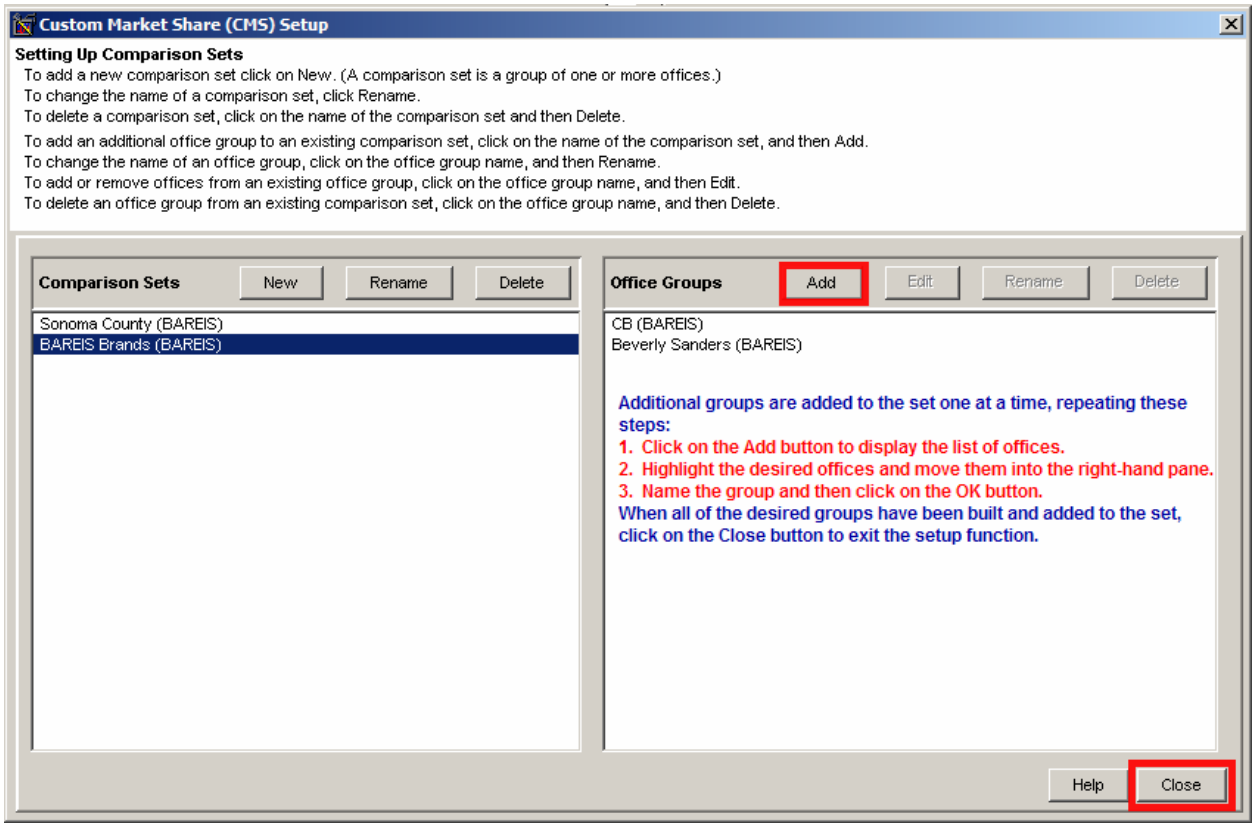
- Sorting on the Name column allows you to group offices from the same company and/or brand easily.
- Standard Windows functionality is available, such as Shift-click and CTRL-click, to allow the selection of groups of offices.
- Uncommon spellings, abbreviations and typos within the MLS system can be seen easily and included in your group, e.g. C-21, C21, C/21, Century 21.
- Groups can be given meaningful and easy to remember names so that you are not limited to using the "official" MLS name, which is often long and cumbersome.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

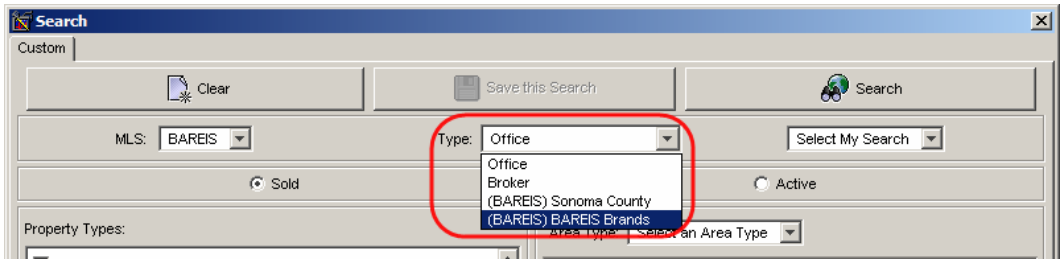
4. Click the **Add** button and repeat Steps 2 and 3 above to create as many separate groups of offices as you like. When you have finished building all the desired groups and have added them to the set, click the **Close** button to save the set and exit the wizard.

   There is no limit to the number of competitor sets that can be built. Create as many sets as you need to accomplish your market research objectives.

   However, each set can contain no more than 20 individual groups.


Custom Market Share (CMS) Setup
Setting Up Comparison Sets
To add a new comparison set click on New. (A comparison set is a group of one or more offices.)
To change the name of a comparison set, click Rename.
To delete a comparison set, click on the name of the comparison set and then Delete.
To add an additional office group to an existing comparison set, click on the name of the comparison set, and then Add.
To change the name of an office group, click on the office group name, and then Rename.
To add or remove offices from an existing office group, click on the office group name, and then Edit.
To delete an office group from an existing comparison set, click on the office group name, and then Delete.
Comparison Sets
New
Rename
Delete
Sonoma County (BAREIS)
BAREIS Brands (BAREIS)
Office Groups
Add
Edit
Rename
Delete
CB (BAREIS)
Beverly Sanders (BAREIS)
Additional groups are added to the set one at a time, repeating these steps:
1. Click on the Add button to display the list of offices.
2. Highlight the desired offices and move them into the right-hand pane.
3. Name the group and then click on the OK button.
When all of the desired groups have been built and added to the set, click on the Close button to exit the setup function.
Help
Close

The sets will appear in the drop-down pick list of Types on the search screen:

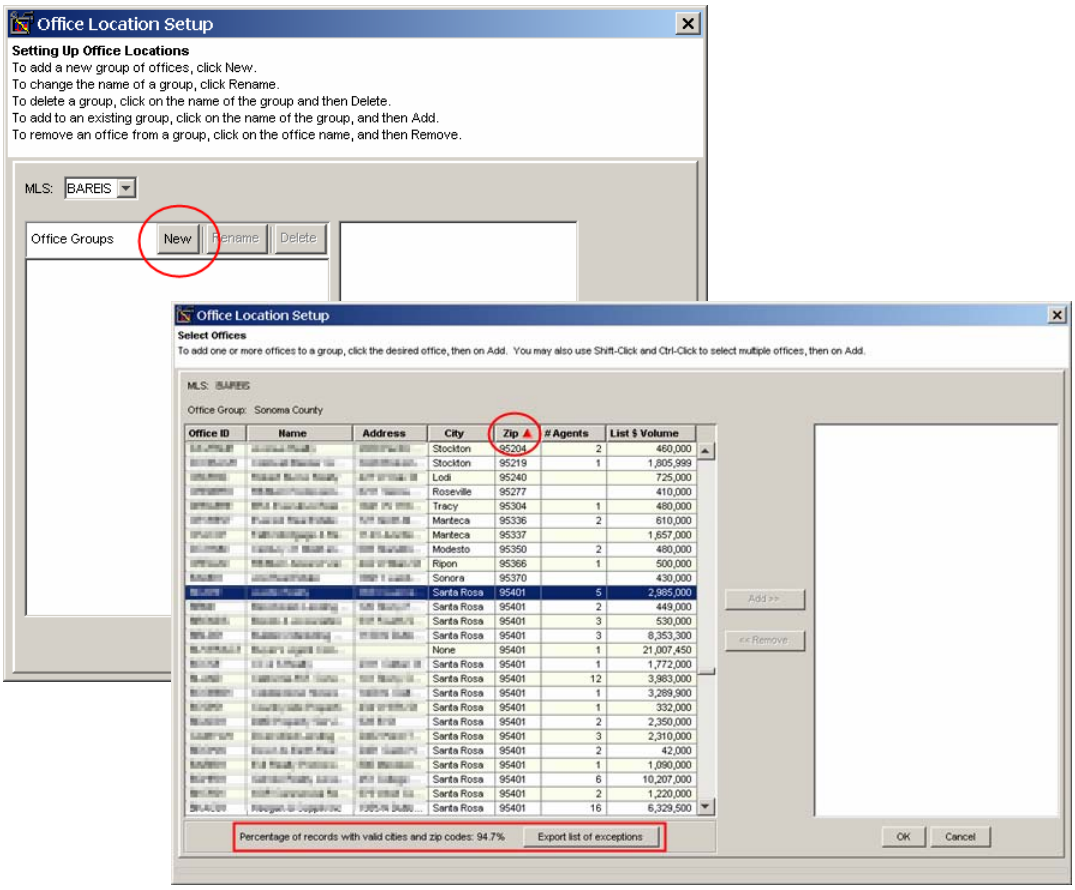


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Market Growth Office Setup (GIS)

Allows you to create groups of offices so you can see only those offices in which you have an interest (from an internal standpoint or a competitive standpoint).

- Only offices with valid cities and zip codes will be listed. The percentage of offices with valid cities and zip codes is shown below the list.
- Export a list of offices with invalid cities or zip codes so you can follow up with appropriate individuals for corrections.
- Create geographical groupings (sort on the City or Zip columns), or groups of competitors (sort on the Office ID or Name columns).

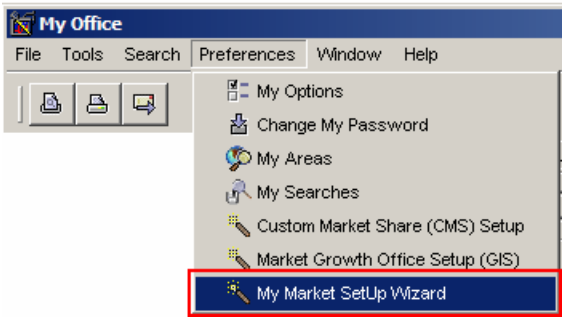

Office Location Setup
Setting Up Office Locations
To add a new group of offices, click New.
To change the name of a group, click Rename.
To delete a group, click on the name of the group and then Delete.
To add to an existing group, click on the name of the group, and then Add.
To remove an office from a group, click on the office name, and then Remove.
MLS: BAREIS
Office Groups
New
Rename
Delete
Office Location Setup
Select Offices
To add one or more offices to a group, click the desired office, then on Add. You may also use Shift-Click and Ctrl-Click to select multiple offices, then on Add.
Office Group: Sonoma County
Office ID
Name
Address
City
Zip
Agents
List $ Volume
Add >>
<< Remove
Percentage of records with valid cities and zip codes: 94.7%
Export list of exceptions
OK
Cancel

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

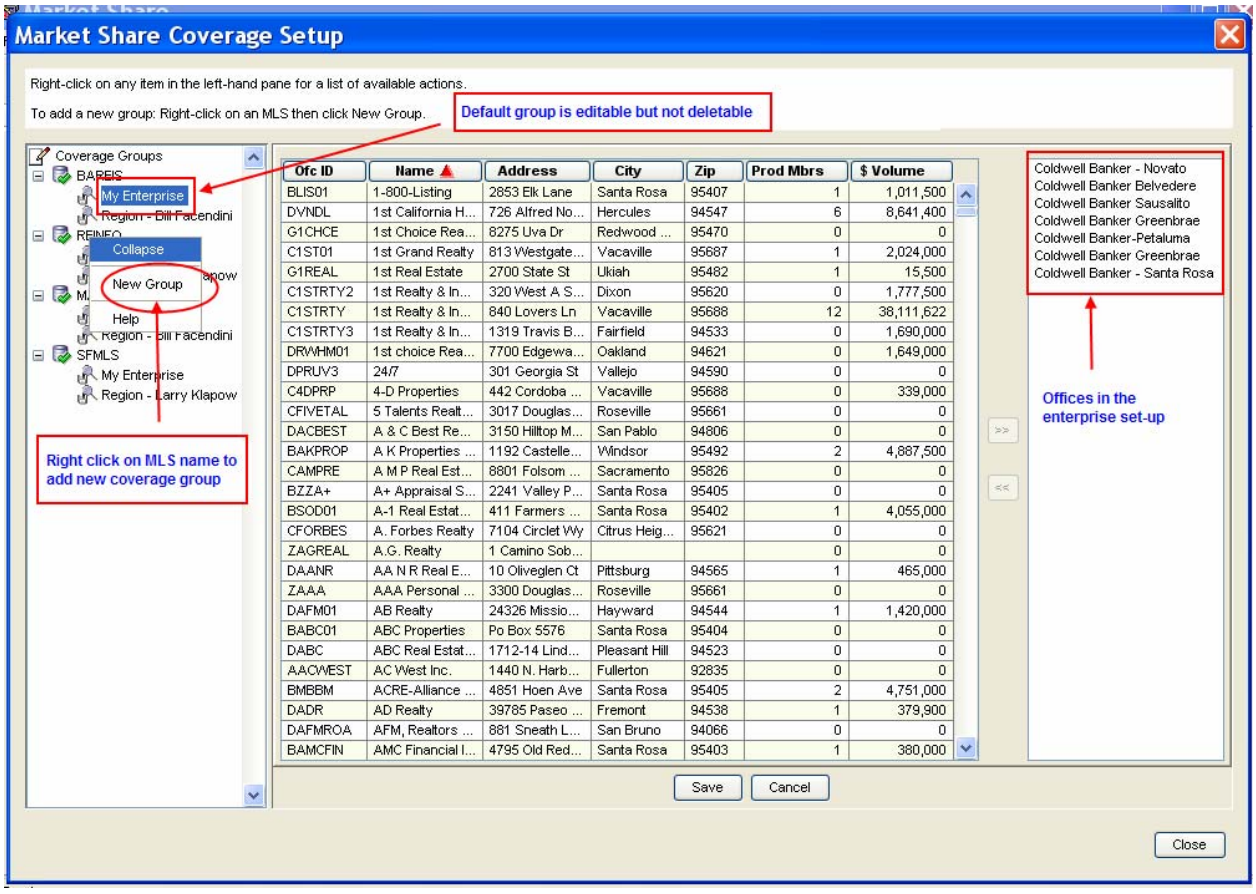
Market Share Coverage Setup

Allows the user to create market service area groups of their office(s) or prime competitors' to identify real-time comparison tracking.

Select *My Market Set Up Wizard* on the Preferences menu.



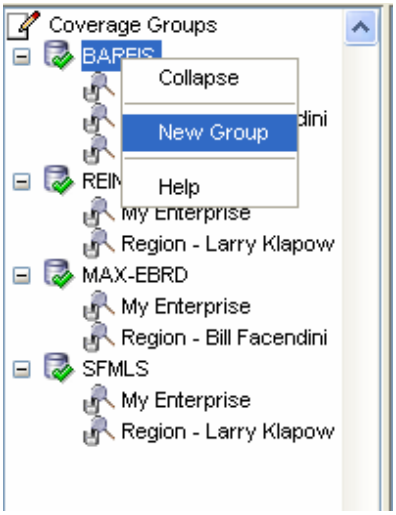
A default coverage group will be created the first time a user accesses the Market Share Coverage search tab or the coverage group set-up. The default coverage group(s) will include all offices in your enterprise(s) (one for each MLS you have access to).


Market Share Coverage Setup
Right-click on any item in the left-hand pane for a list of available actions.
To add a new group: Right-click on an MLS then click New Group.
Default group is editable but not deletable
Coverage Groups
BARIS
My Enterprise
Region - Bill Facendini
RENEO
Collapse
New Group
Help
SFMLS
My Enterprise
Region - Larry Klapow
Right click on MLS name to add new coverage group
Ofc ID
Name
Address
City
Zip
Prod Mbrs
$ Volume
BLIS01 1-800-Listing 2853 Elk Lane Santa Rosa 95407 1 1,011,500
DVNDL 1st California H... 726 Alfred No... Hercules 94547 6 8,641,400
G1CHCE 1st Choice Rea... 8275 Uva Dr Redwood ... 95470 0 0
C1ST01 1st Grand Realty 813 Westgate... Vacaville 95687 1 2,024,000
G1REAL 1st Real Estate 2700 State St Ukiah 95482 1 15,500
C1STRTY2 1st Realty & In... 320 West A S... Dixon 95620 0 1,777,500
C1STRTY 1st Realty & In... 840 Lovers Ln Vacaville 95688 12 38,111,622
C1STRTY3 1st Realty & In... 1319 Travis B... Fairfield 94533 0 1,690,000
DRWHM01 1st choice Rea... 7700 Edgewa... Oakland 94621 0 1,649,000
DPRUV3 24/7 301 Georgia St Vallejo 94590 0 0
C4DPRP 4-D Properties 442 Cordoba ... Vacaville 95688 0 339,000
CFIVETAL 5 Talents Realt... 3017 Douglas... Roseville 95661 0 0
DACBEST A & C Best Re... 3150 Hilltop M... San Pablo 94806 0 0
BAKPROP A K Properties ... 1192 Castelle... Windsor 95492 2 4,887,500
CAMPRE A M P Real Est... 8801 Folsom ... Sacramento 95826 0 0
BZZA+ A+ Appraisal S... 2241 Valley P... Santa Rosa 95405 0 0
BSOD01 A-1 Real Estat... 411 Farmers ... Santa Rosa 95402 1 4,055,000
CFORBES A. Forbes Realty 7104 Circlet Wy Citrus Heig... 95621 0 0
ZAGREAL A.G. Realty 1 Camino Sob... 0 0
DAANR AA N R Real E... 10 Oliveglen Ct Pittsburg 94565 1 465,000
ZAAA AAA Personal ... 3300 Douglas... Roseville 95661 0 0
DAFM01 AB Realty 24326 Missio... Hayward 94544 1 1,420,000
BABC01 ABC Properties Po Box 5576 Santa Rosa 95404 0 0
DABC ABC Real Estat... 1712-14 Lind... Pleasant Hill 94523 0 0
AACWEST AC West Inc. 1440 N. Harb... Fullerton 92835 0 0
BMBBM ACRE-Alliance ... 4851 Hoen Ave Santa Rosa 95405 2 4,751,000
DADR AD Realty 39785 Paseo ... Fremont 94538 1 379,900
DAFMROA AFM, Realtors ... 881 Sneath L... San Bruno 94066 0 0
BAMCFIN AMC Financial I... 4795 Old Red... Santa Rosa 95403 1 380,000
Coldwell Banker - Novato
Coldwell Banker Belvedere
Coldwell Banker Sausalito
Coldwell Banker Greenbrae
Coldwell Banker-Petaluma
Coldwell Banker Greenbrae
Coldwell Banker - Santa Rosa
Offices in the enterprise set-up
Save
Cancel
Close

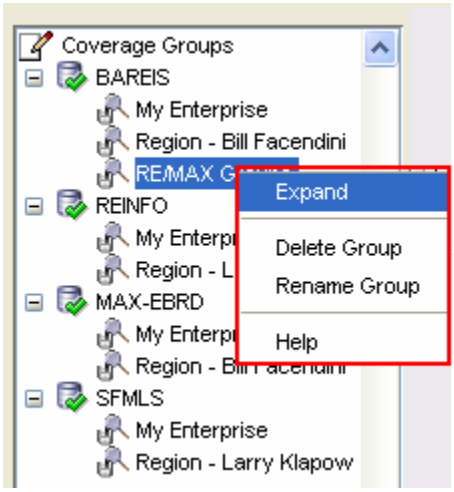
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

To add and edit groups:

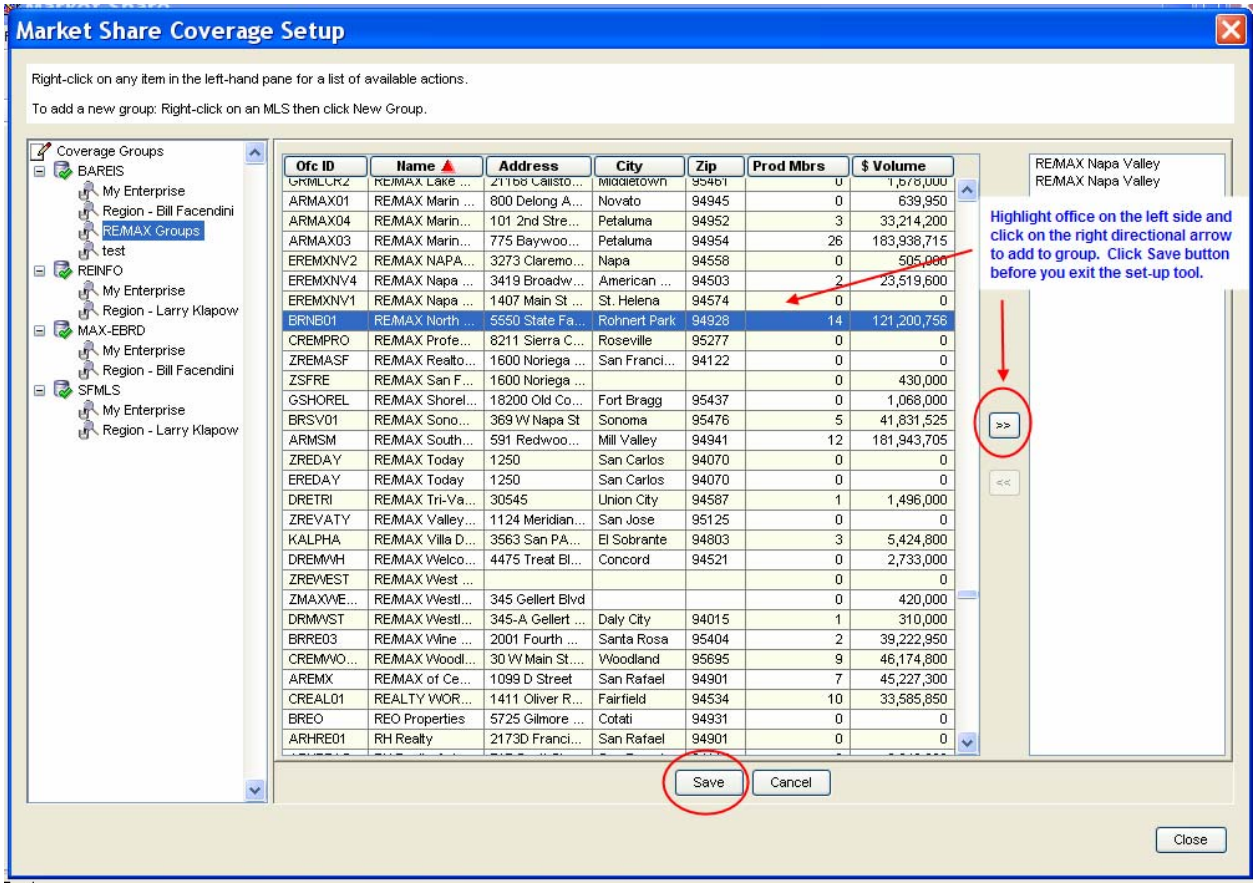
Right click on MLS name and assign a name to add a new group



Right click on group name to delete or rename group.



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.


Market Share Coverage Setup
Right-click on any item in the left-hand pane for a list of available actions.
To add a new group: Right-click on an MLS then click New Group.
Coverage Groups
BAREIS
My Enterprise
Region - Bill Facendini
RE/MAX Groups
test
REINFO
My Enterprise
Region - Larry Klapow
MAX-EBRD
My Enterprise
Region - Bill Facendini
SFMLS
My Enterprise
Region - Larry Klapow
Ofc ID
Name
Address
City
Zip
Prod Mbrs
$ Volume
ARMAX01 RE/MAX Marin ... 800 Delong A... Novato 94945 0 639,950
ARMAX04 RE/MAX Marin... 101 2nd Stre... Petaluma 94952 3 33,214,200
ARMAX03 RE/MAX Marin... 775 Baywoo... Petaluma 94954 26 183,938,715
EREMXNV2 RE/MAX NAPA... 3273 Claremo... Napa 94558 0 505,000
EREMXNV4 RE/MAX Napa ... 3419 Broadw... American ... 94503 2 23,519,600
EREMXNV1 RE/MAX Napa ... 1407 Main St ... St. Helena 94574 0 0
BRNB01 RE/MAX North ... 5550 State Fa... Rohnert Park 94928 14 121,200,756
CREMPRO RE/MAX Profe... 8211 Sierra C... Roseville 95277 0 0
ZREMASF RE/MAX Realto... 1600 Noriega ... San Franci... 94122 0 0
ZSFRE RE/MAX San F... 1600 Noriega ... 0 430,000
GSHOREL RE/MAX Shorel... 18200 Old Co... Fort Bragg 95437 0 1,068,000
BRSV01 RE/MAX Sono... 369 W Napa St Sonoma 95476 5 41,831,525
ARMSM RE/MAX South... 591 Redwoo... Mill Valley 94941 12 181,943,705
ZREDAY RE/MAX Today 1250 San Carlos 94070 0 0
EREDAY RE/MAX Today 1250 San Carlos 94070 0 0
DRETRI RE/MAX Tri-Va... 30545 Union City 94587 1 1,496,000
ZREVATY RE/MAX Valley... 1124 Meridian... San Jose 95125 0 0
KALPHA RE/MAX Villa D... 3563 San PA... El Sobrante 94803 3 5,424,800
DREMWH RE/MAX Welco... 4475 Treat Bl... Concord 94521 0 2,733,000
ZREWEST RE/MAX West ... 0 0
ZMAXWE... RE/MAX Westl... 345 Gellert Blvd 0 420,000
DRMWST RE/MAX Westl... 345-A Gellert ... Daly City 94015 1 310,000
BRRE03 RE/MAX Wine ... 2001 Fourth ... Santa Rosa 95404 2 39,222,950
CREMWO... RE/MAX Woodl... 30 W Main St.... Woodland 95695 9 46,174,800
AREMX RE/MAX of Ce... 1099 D Street San Rafael 94901 7 45,227,300
CREAL01 REALTY WOR... 1411 Oliver R... Fairfield 94534 10 33,585,850
BREO REO Properties 5725 Gilmore ... Cotati 94931 0 0
ARHRE01 RH Realty 2173D Franci... San Rafael 94901 0 0
RE/MAX Napa Valley
RE/MAX Napa Valley
Highlight office on the left side and click on the right directional arrow to add to group. Click Save button before you exit the set-up tool.
>>
<<
Save
Cancel
Close

- Move an office from the list on the left into the selection window on the right.
  Tip: Click on the Name column header to sort the offices alphabetically, then select groups of offices from the same company.
- Click on the Save button to add the selected offices to the group.
- Click on the Close button to exit set-up

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

My Enterprise

The tool that allows senior management to view their operations in real time.

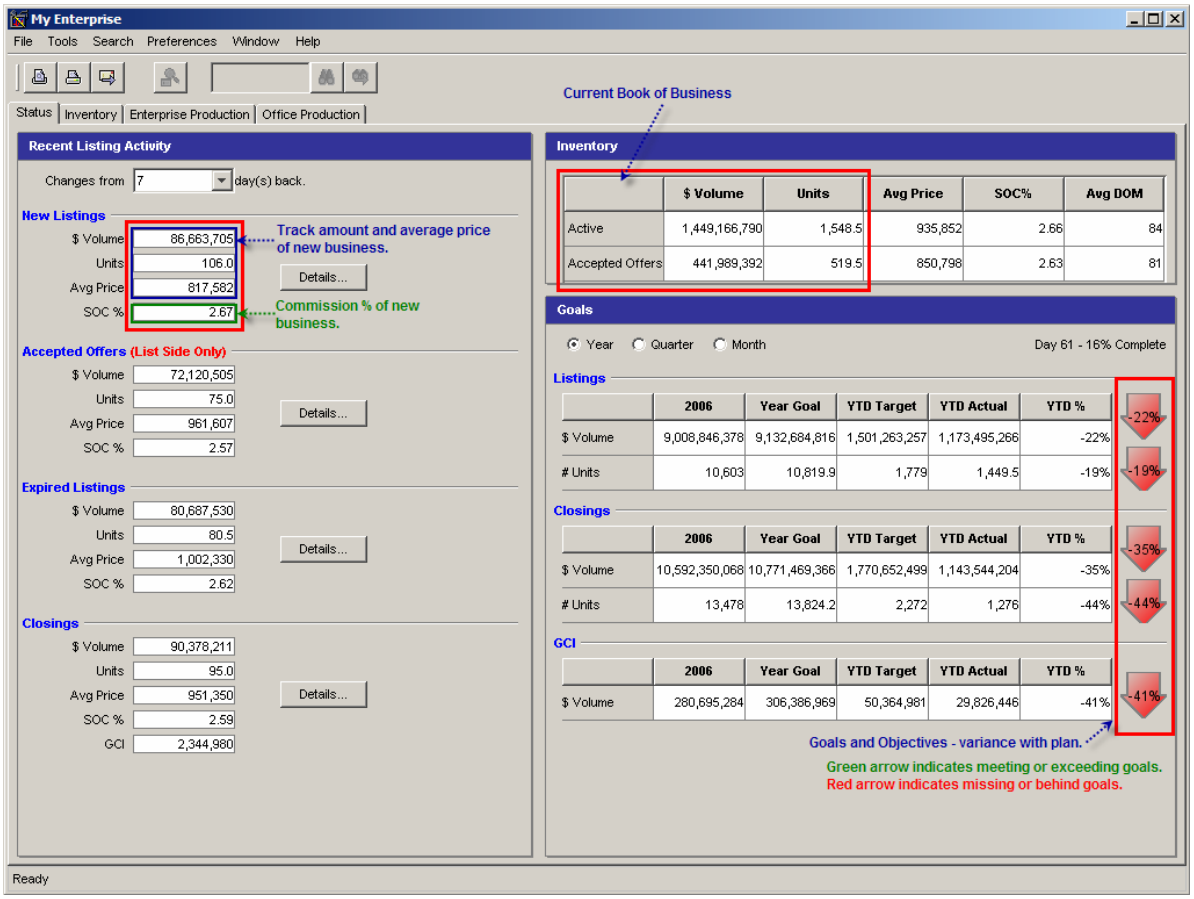
There are four tabs in the My Enterprise section:

- Status
- Inventory
- Enterprise Production
- Office Production

Status

Three at-a-glance views of important company operating information:

- Recent Listing Activity (1-31 days back)
- Inventory (current active inventory and under contract listings)
- Goals (performance vs. plan)

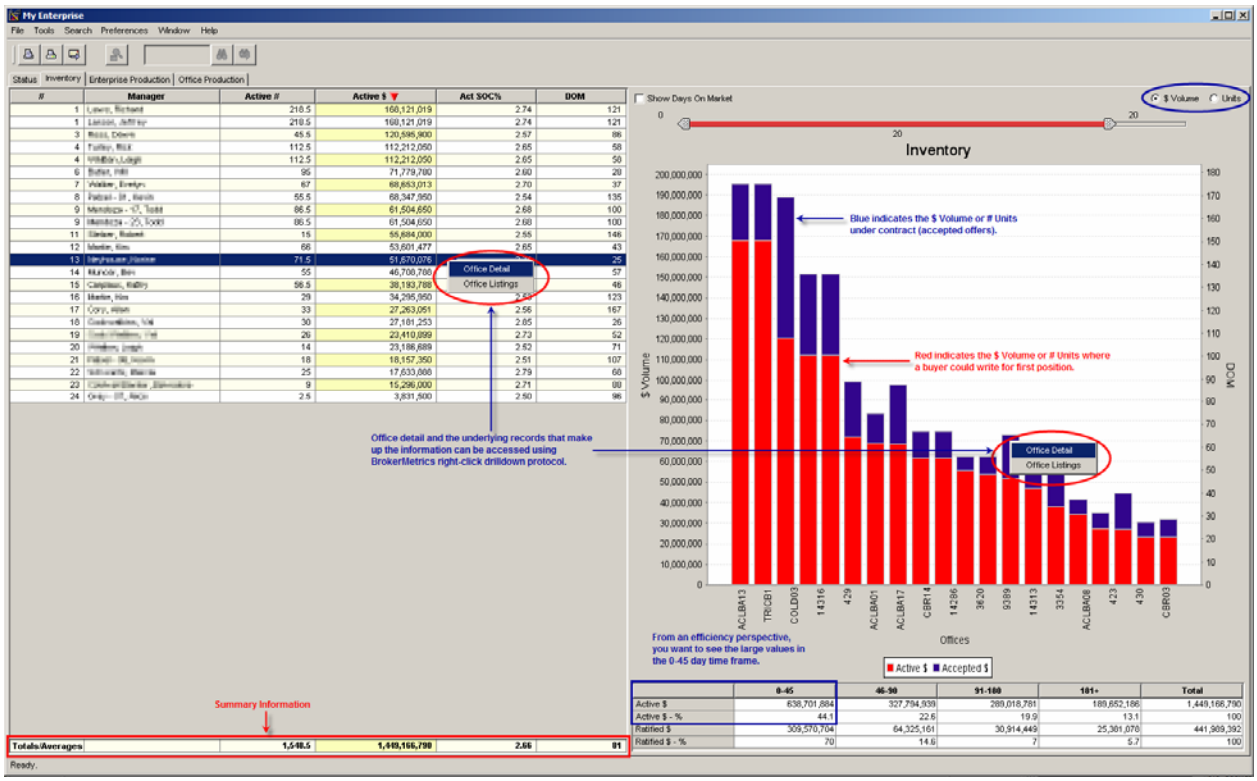


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Inventory

Provides an at-a-glance view of current listings on a $ Volume or # Units basis.

- The stacked bar chart separates active listings (red) from accepted offers (blue).
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function on any inventory table row or chart bar, and is exportable to any database program (e.g. Excel) if desired.
- Place mouse pointer over chart bar to display the exact value.
- The table below the chart contains important DOM information: 0 – 45 days is the optimum range to find active inventory.

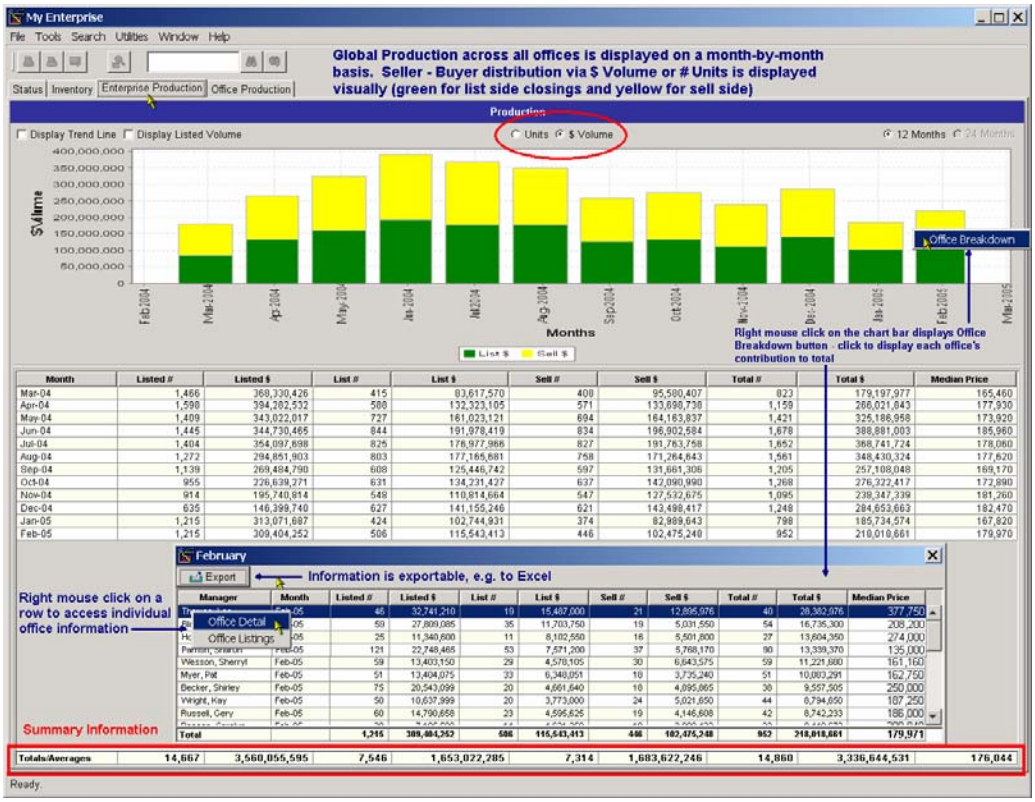

Inventory
Blue indicates the $ Volume or # Units under contract (accepted offers).
Red indicates the $ Volume or # Units where a buyer could write for first position.
Office detail and the underlying records that make up the information can be accessed using BrokerMetrics right-click drilldown protocol.
Summary Information
From an efficiency perspective, you want to see the large values in the 0-45 day time frame.
Office Detail
Office Listings
$ Volume
DOM
Offices
Active $
Accepted $

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Enterprise Production

Provides an at-a-glance view of company production from a $ Volume and # Units perspective.

- List side transactions (green) are visually separated from sell side transactions (yellow) to clearly indicate the sales distribution and transaction balance.
- Both 12- and 24-month views are available.
- Summary information is provided at the bottom of the table.
- A trend line is available to help visualize the direction of movement.
- There is an overlay that displays the $ volume of properties that were listed in any given month.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.

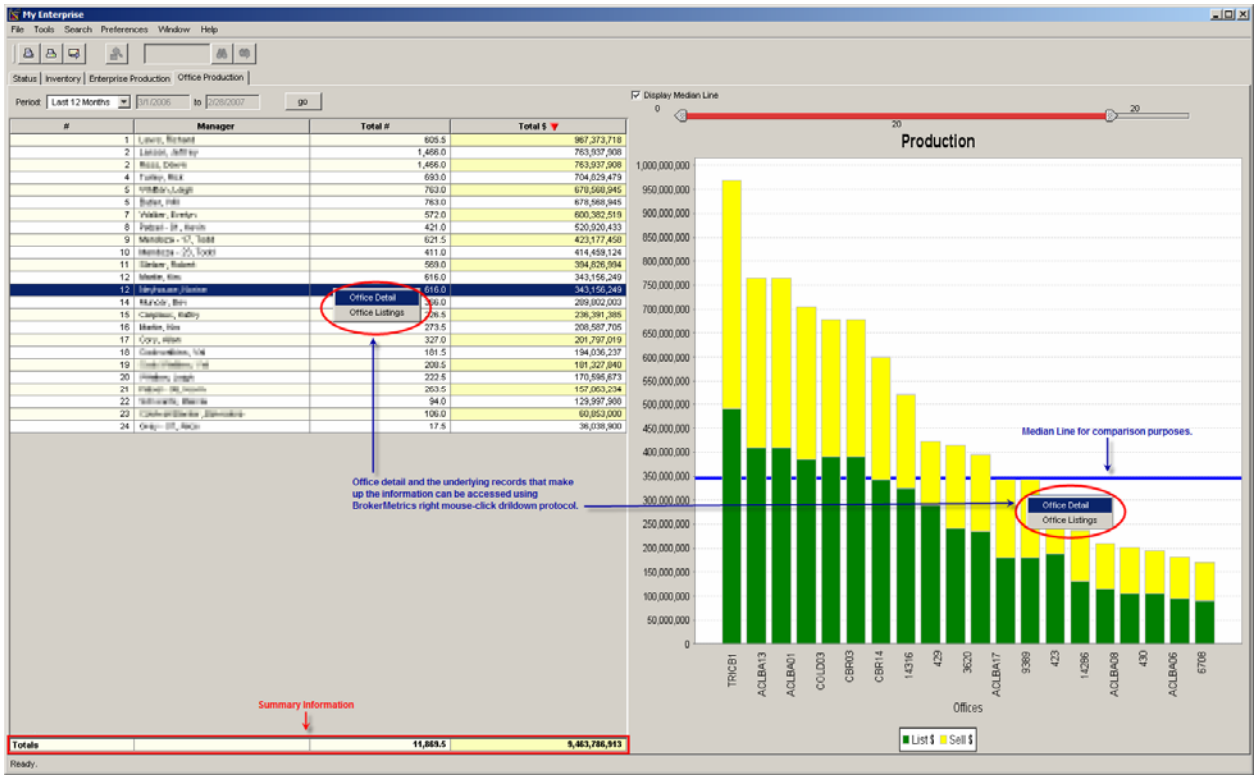


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Office Production

Provides an at-a-glance view of office-by-office production over any time period desired.

- List side transactions (green) are visually separated from sell side transactions (yellow) to indicate distribution and overall transaction balance.
- Summary information is provided at the bottom of the table.
- A median line is provided for reference purposes.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.


Office detail and the underlying records that make up the information can be accessed using BrokerMetrics right mouse-click drilldown protocol.
Summary Information
Median Line for comparison purposes.
Office Detail
Office Listings
Production
Offices
List $
Sell $

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

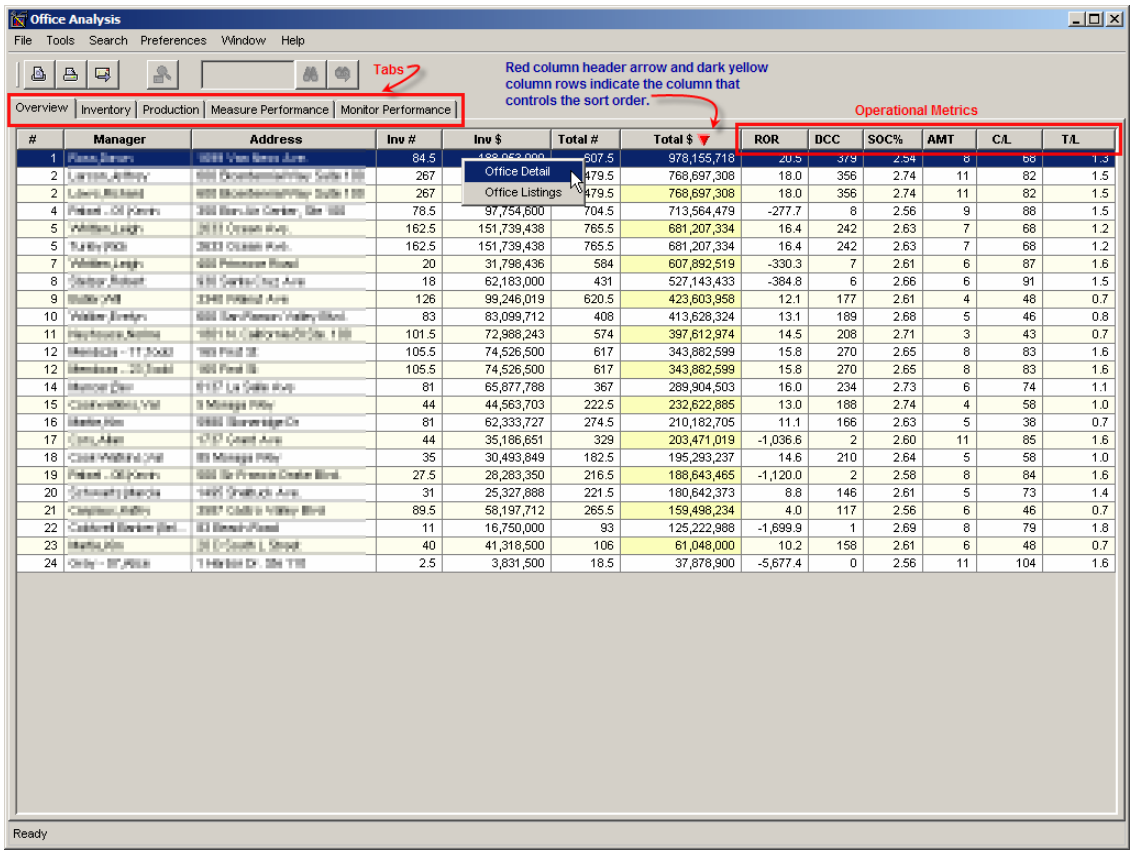
Office Analysis

Provides senior management with at-a-glance views of each individual office's performance. The individual tabs allow management to focus on the important operating characteristics of each office.

Overview

Provides a global view of each office's inventory, production, and operational metrics over the last complete 12 months.

- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.
- The red column header arrow and darker column row color indicate the column that is controlling the sort order.


Office Analysis
File Tools Search Preferences Window Help
Tabs
Red column header arrow and dark yellow column rows indicate the column that controls the sort order.
Overview | Inventory | Production | Measure Performance | Monitor Performance
Operational Metrics
Office Detail
Office Listings
Ready

#	Manager	Address	Inv #	Inv $	Total #	Total $	ROR	DCC	SOC%	AMT	C/L	T/L
1	[redacted]	[redacted]	84.5	[redacted]	607.5	978,155,718	20.5	379	2.54	8	68	1.3
2	[redacted]	[redacted]	267	[redacted]	479.5	768,697,308	18.0	356	2.74	11	82	1.5
2	[redacted]	[redacted]	267	[redacted]	479.5	768,697,308	18.0	356	2.74	11	82	1.5
4	[redacted]	[redacted]	78.5	97,754,600	704.5	713,564,479	-277.7	8	2.56	9	88	1.5
5	[redacted]	[redacted]	162.5	151,739,438	765.5	681,207,334	16.4	242	2.63	7	68	1.2
5	[redacted]	[redacted]	162.5	151,739,438	765.5	681,207,334	16.4	242	2.63	7	68	1.2
7	[redacted]	[redacted]	20	31,798,436	584	607,892,519	-330.3	7	2.61	6	87	1.6
8	[redacted]	[redacted]	18	62,183,000	431	527,143,433	-384.8	6	2.66	6	91	1.5
9	[redacted]	[redacted]	126	99,246,019	620.5	423,603,958	12.1	177	2.61	4	48	0.7
10	[redacted]	[redacted]	83	83,099,712	408	413,628,324	13.1	189	2.68	5	46	0.8
11	[redacted]	[redacted]	101.5	72,988,243	574	397,612,974	14.5	208	2.71	3	43	0.7
12	[redacted]	[redacted]	105.5	74,526,500	617	343,882,599	15.8	270	2.65	8	83	1.6
12	[redacted]	[redacted]	105.5	74,526,500	617	343,882,599	15.8	270	2.65	8	83	1.6
14	[redacted]	[redacted]	81	65,877,788	367	289,904,503	16.0	234	2.73	6	74	1.1
15	[redacted]	[redacted]	44	44,563,703	222.5	232,622,885	13.0	188	2.74	4	58	1.0
16	[redacted]	[redacted]	81	62,333,727	274.5	210,182,705	11.1	166	2.63	5	38	0.7
17	[redacted]	[redacted]	44	35,186,651	329	203,471,019	-1,036.6	2	2.60	11	85	1.6
18	[redacted]	[redacted]	35	30,493,849	182.5	195,293,237	14.6	210	2.64	5	58	1.0
19	[redacted]	[redacted]	27.5	28,283,350	216.5	188,643,465	-1,120.0	2	2.58	8	84	1.6
20	[redacted]	[redacted]	31	25,327,888	221.5	180,642,373	8.8	146	2.61	5	73	1.4
21	[redacted]	[redacted]	89.5	58,197,712	265.5	159,498,234	4.0	117	2.56	6	46	0.7
22	[redacted]	[redacted]	11	16,750,000	93	125,222,988	-1,699.9	1	2.69	8	79	1.8
23	[redacted]	[redacted]	40	41,318,500	106	61,048,000	10.2	158	2.61	6	48	0.7
24	[redacted]	[redacted]	2.5	3,831,500	18.5	37,878,900	-5,677.4	0	2.56	11	104	1.6

Operational Metrics

ROR (Return on Revenue) – Percentage of GCI revenue that is NET to the office after ALL expenses have been paid. It is a very direct measure of operational efficiency relative to the BOTTOM line.

DCC (Desk Cost Coverage) – Measures gross profit vs. gross expenses as a percentage. 100% represents the breakeven point. Important because positive increases over time indicate increasing operational efficiencies which translates to profit.

SOC% (Selling Office Commission) – The office's average commission offered to cooperating brokers. The office's list-side commission must be inferred from local custom, e.g. 50-50 splits. It is a direct measure of how the office's agent population takes listings at prevailing market rates. This directly impacts the BOTTOM LINE.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

AMT (Average Marketing Time) – Measures the average number of weeks that the office needs to expend dollars to market their listings before they go under contract or expire. A lower AMT translates into faster revenue generation and less marketing dollars per property. This provides a beneficial impact to the BOTTOM LINE.

C/L (Closed-to-List Ratio) – Measures the number of listings closed relative to the number taken on a percentage basis. Important because all listings incur an expense for the office while only those that close generate revenue. Small positive changes have a large impact on the BOTTOM LINE because additional closings are almost pure profit.

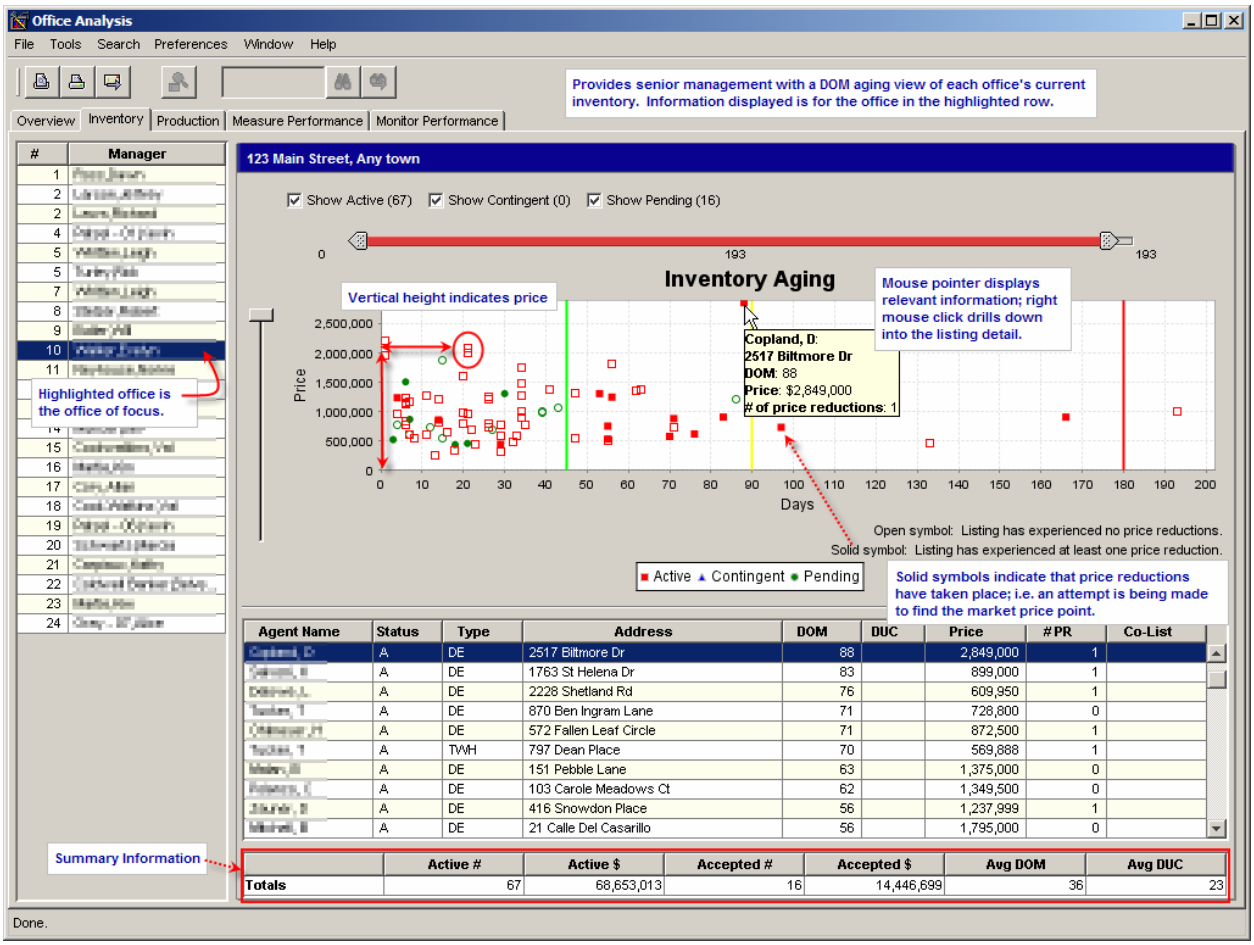
T/L (Transactions-to-List Ratio) – Measures the total number of closed transactions versus the number of listings taken. Small positive changes have a large impact on the BOTTOM LINE because additional closings are almost pure profit. This ratio also indicates the office's ability to maintain a balanced book of business which will help it adapt well to changing market conditions. Levels of 1.2 or higher are desired.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Inventory

Provides the same DOM aging view of Inventory that the office manager sees using their office version of BrokerMetrics®.

- Highlighted row is office of focus.
- Symbols that are solid indicate that price reductions have taken place. This is a direct indicator that the sellers of the property are trying to "find" the market. Conversely, long DOM properties with hollow symbols indicate sellers that are "unrealistic" about current market conditions.
- There are 45-90-180 day DOM lines on the chart for visual reference purposes.
- The property list price is indicated through the symbol's vertical height on the chart.

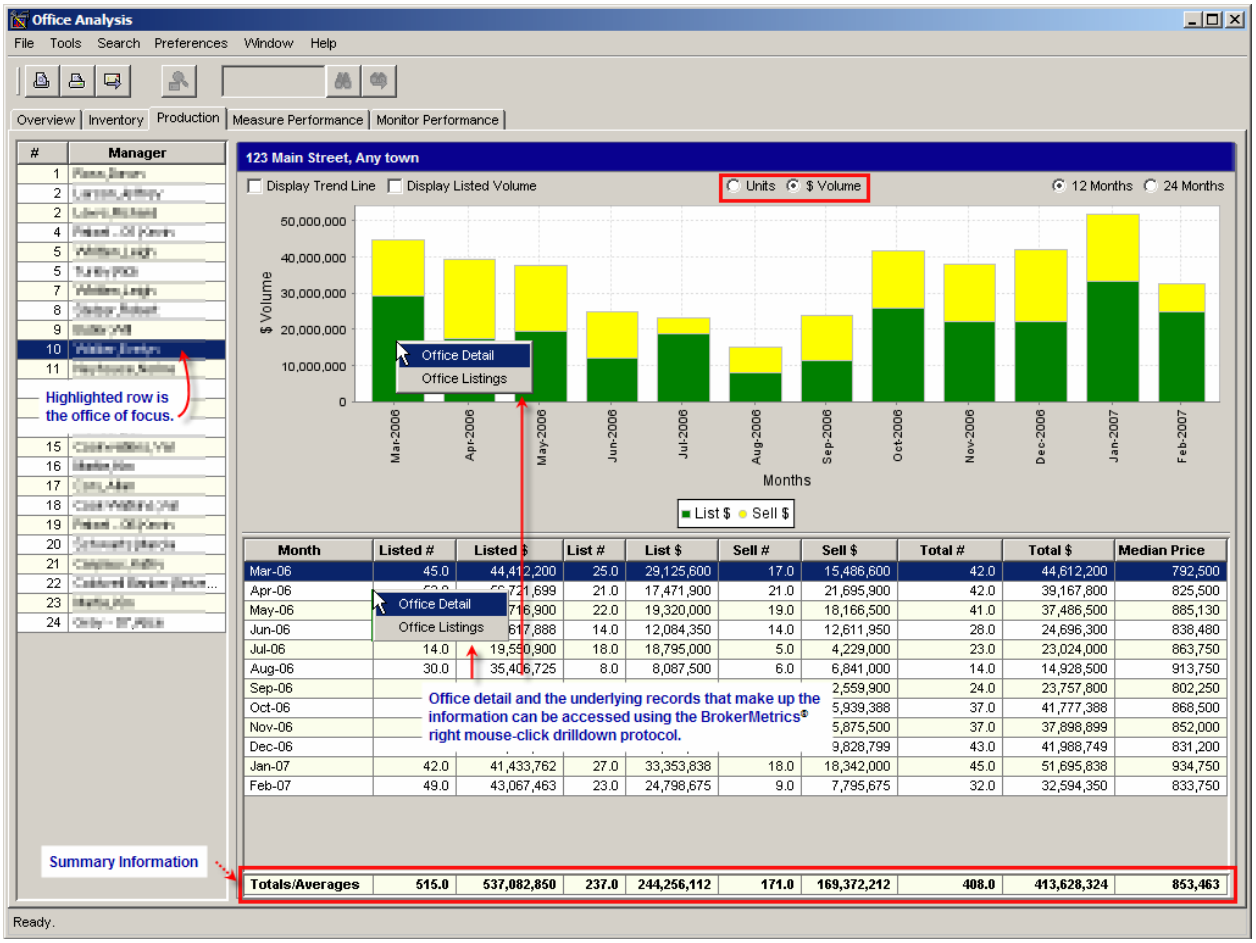

Office Analysis
File Tools Search Preferences Window Help
Provides senior management with a DOM aging view of each office's current inventory. Information displayed is for the office in the highlighted row.
Overview Inventory Production Measure Performance Monitor Performance
123 Main Street, Any town
Show Active (67) Show Contingent (0) Show Pending (16)
Inventory Aging
Vertical height indicates price
Mouse pointer displays relevant information; right mouse click drills down into the listing detail.
Highlighted office is the office of focus.
Copland, D:
2517 Biltmore Dr
DOM: 88
Price: $2,849,000
# of price reductions: 1
Price
Days
Open symbol: Listing has experienced no price reductions.
Solid symbol: Listing has experienced at least one price reduction.
Active Contingent Pending
Solid symbols indicate that price reductions have taken place; i.e. an attempt is being made to find the market price point.
Summary Information
Totals
Done.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Production

Provides the same view of Production that the office manager (of the highlighted row) sees using their office version of BrokerMetrics®.

- The last (12) or (24) month views are available using either $ Volume or # Units measurements
- List side transactions (green) are visually separated from sell side transactions (yellow) to indicate overall distribution and transaction balance.
- Summary information is provided at the bottom of the table.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.

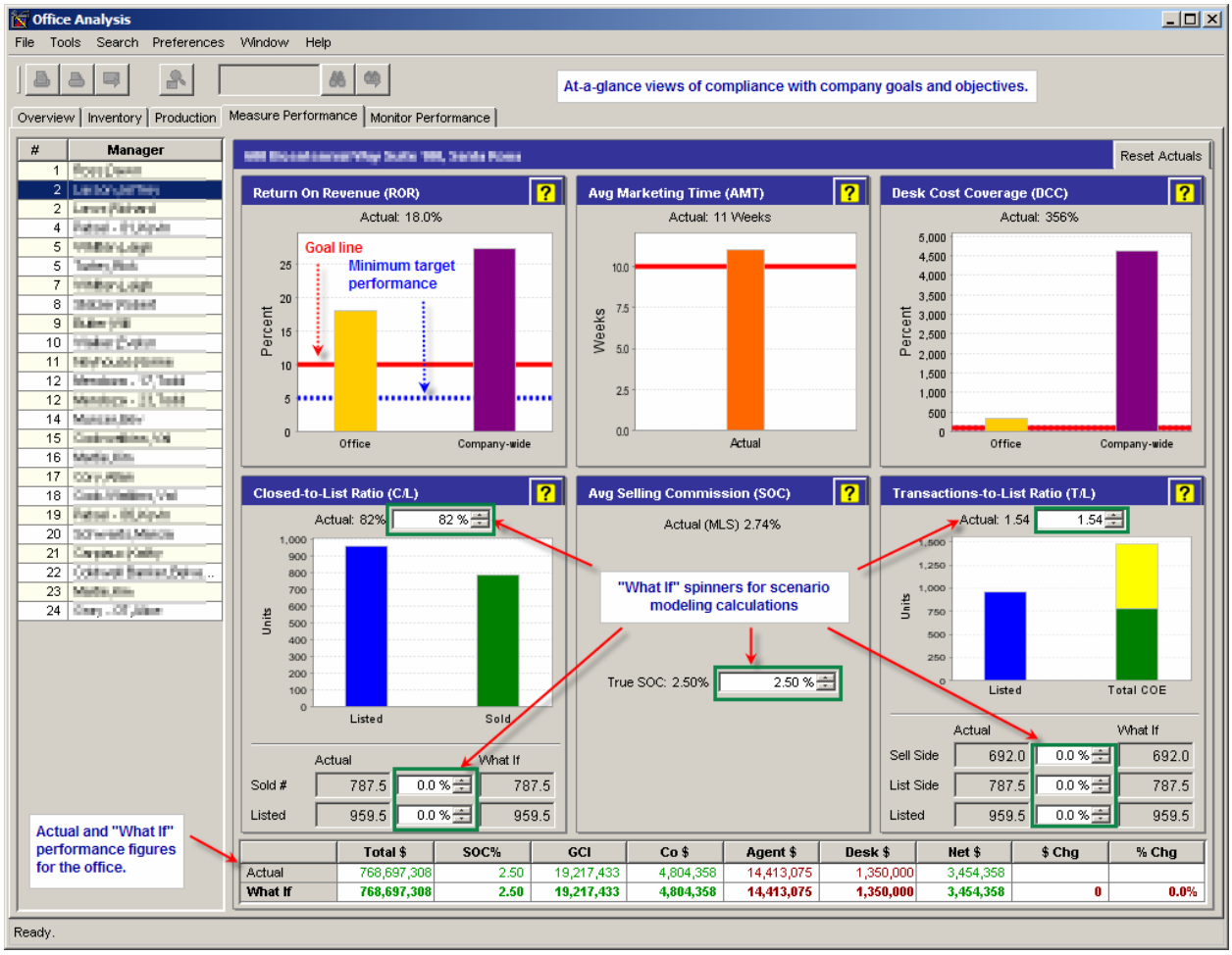


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Measure Performance

Provides the same view of Measure Performance that the office manager sees using their office version of BrokerMetrics®.

- Data time frame is the last 12 complete months
- Company goals are displayed using red lines
- Highlighted row indicates office being viewed
- "What If?" spinners provide scenario modeling capabilities
  - Visualize your goals in real time!
  - What changes would it take to reach them?
  - What would be the financial ramifications?
  - Which offices exceed the goals?
  - Which offices need to improve?

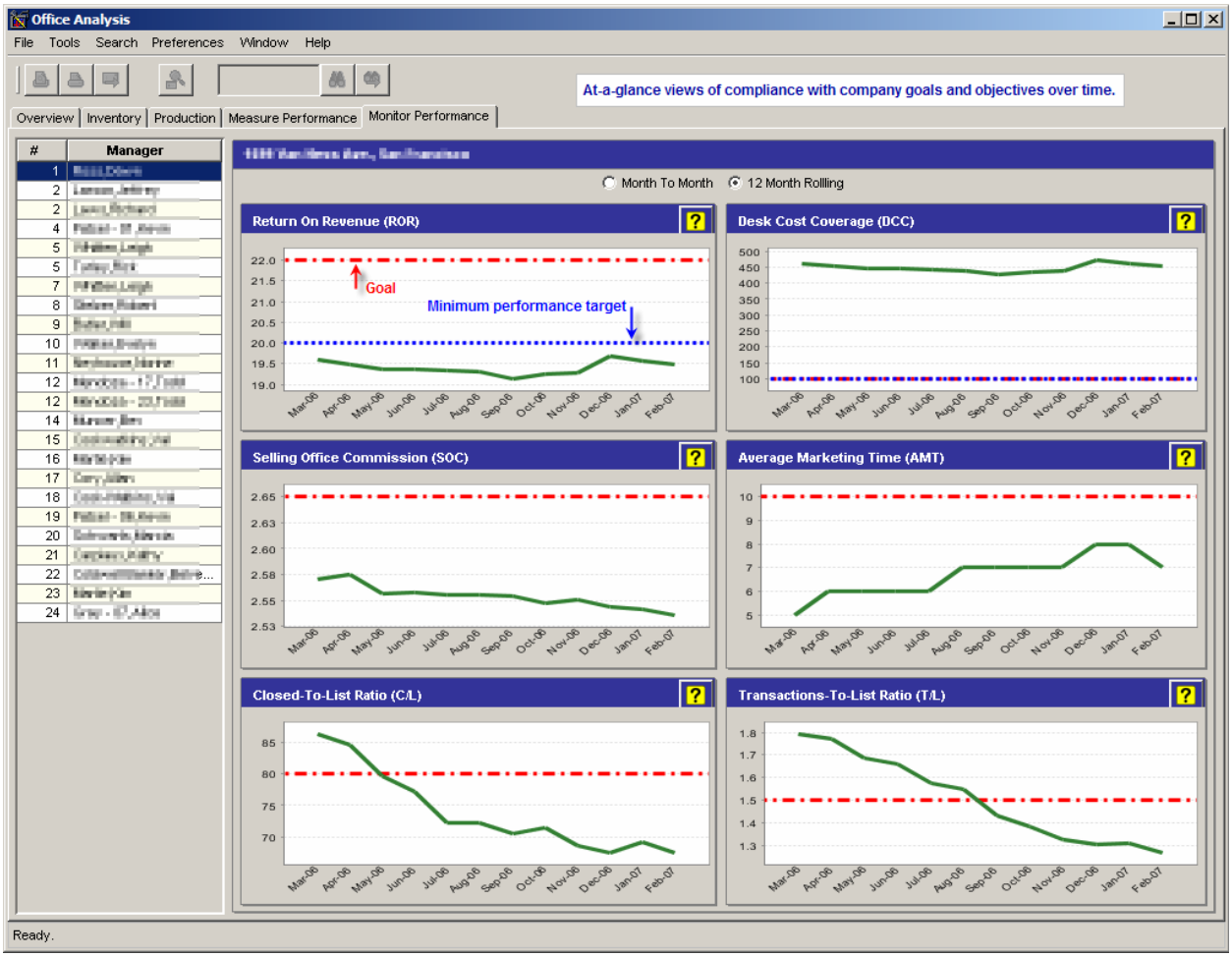


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Monitor Performance

Provides the same view of Monitor Performance that the office manager (of the highlighted row) sees using their office version of BrokerMetrics®.

- Time frame is the last complete 12 months.
- Each data point is a 12-month average.
- The charts reflect the 12-month moving average of the various performance metrics.
- Company goals are displayed using red lines; minimum performance targets are dotted blue.
- Highlighted row indicates office being viewed.



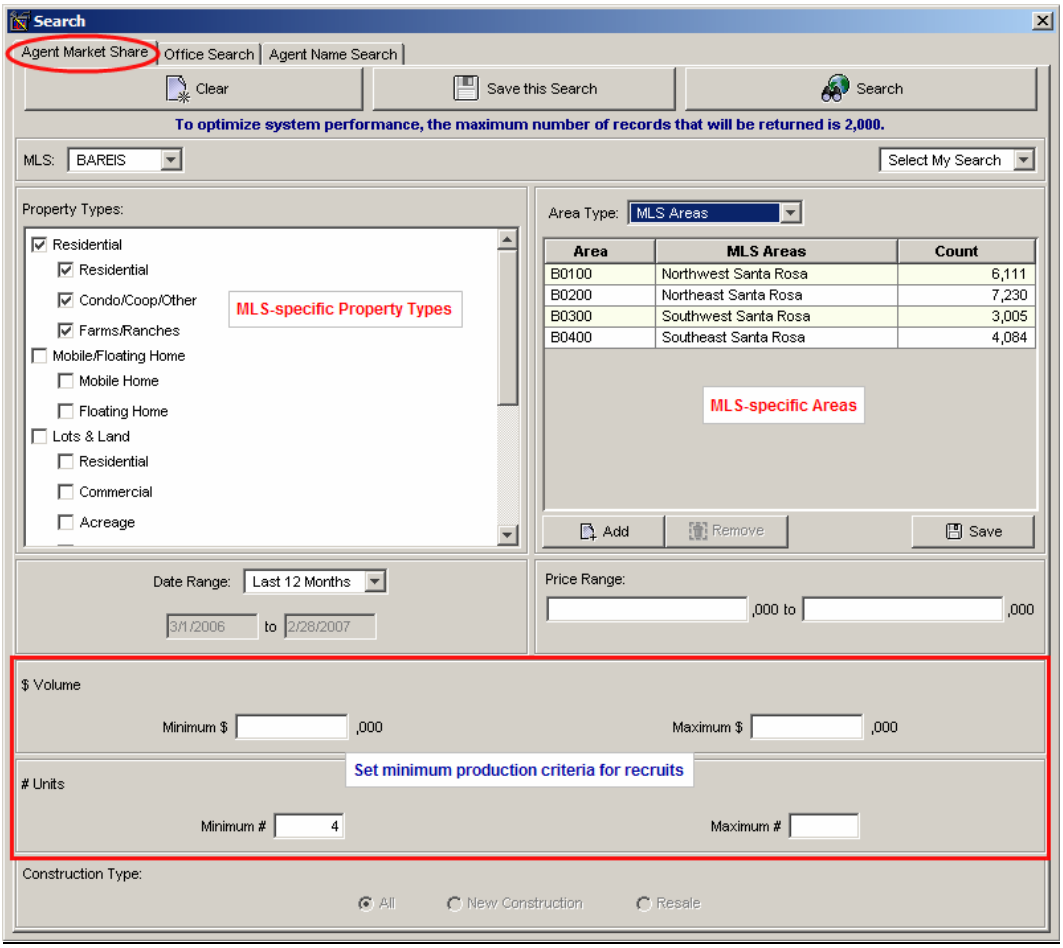
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Recruiting

- Provides 3 easy ways to search for and analyze potential recruits:
  - Agents' market share
  - By office
  - By agent name
- Performs agent level market share calculations.
- Minimum production criteria can be set using $ volume and/or # units.
- Recruits can be analyzed from several perspectives: inventory, production, and operational performance.
- Any recruit's last 12 months of MLS production can be viewed as if they had been a member of your office. Thus, you can determine (before any effort is expended) what bringing them to your office would mean financially!

Recruiting Search Screen

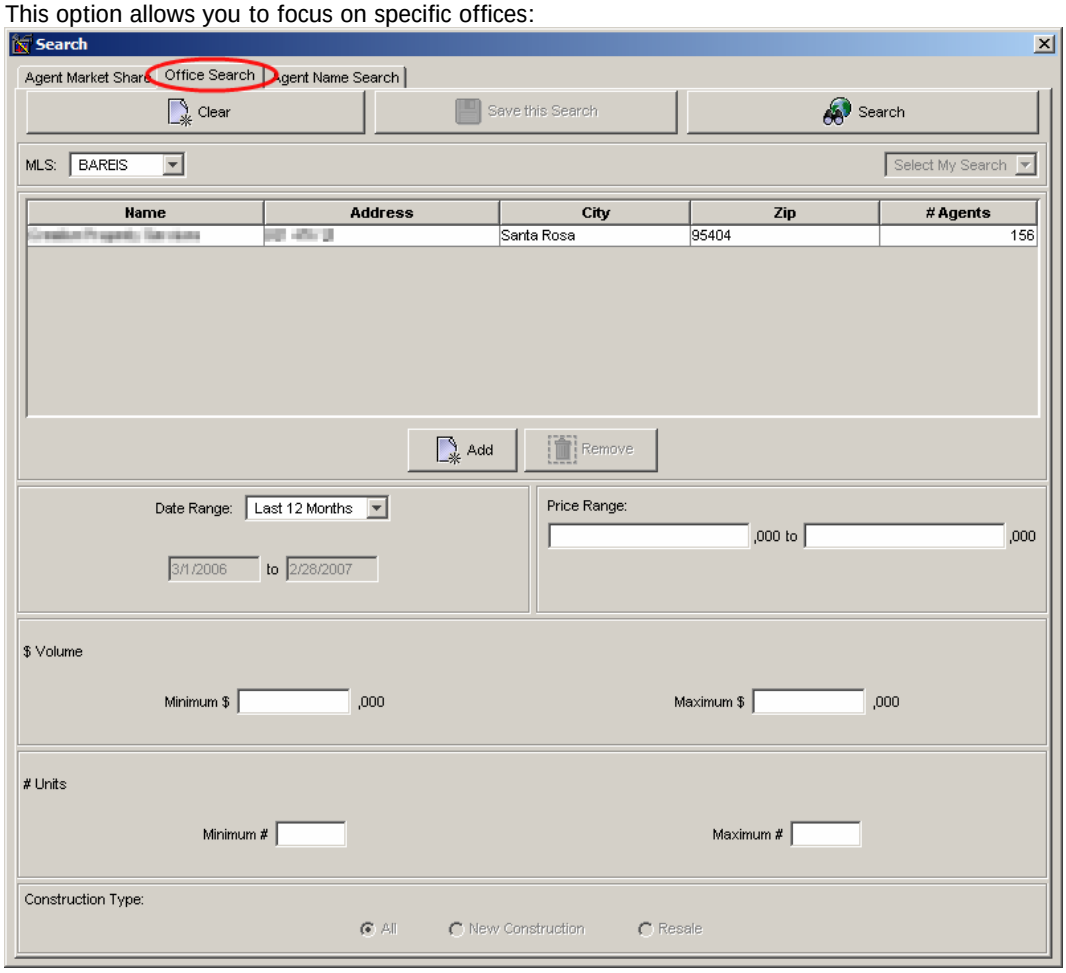
Agent Market Share



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

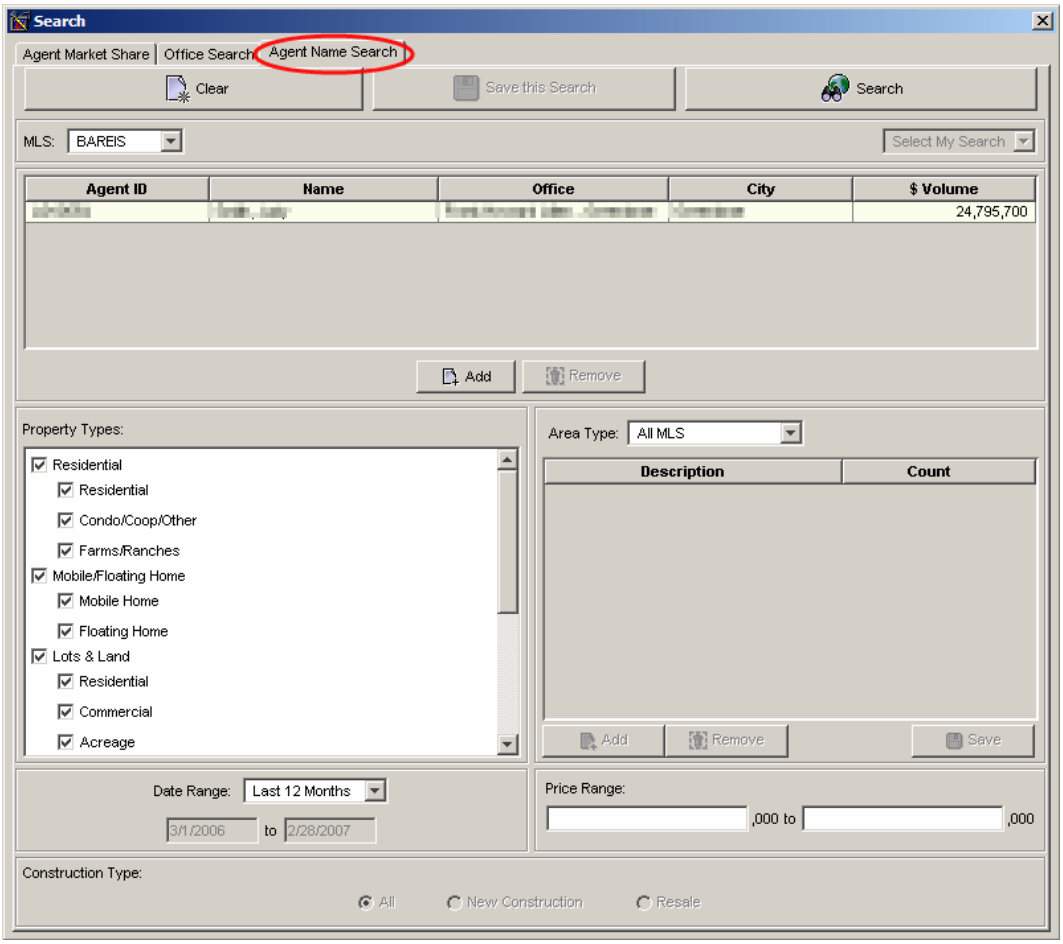
Office Search

This option allows you to focus on specific offices:



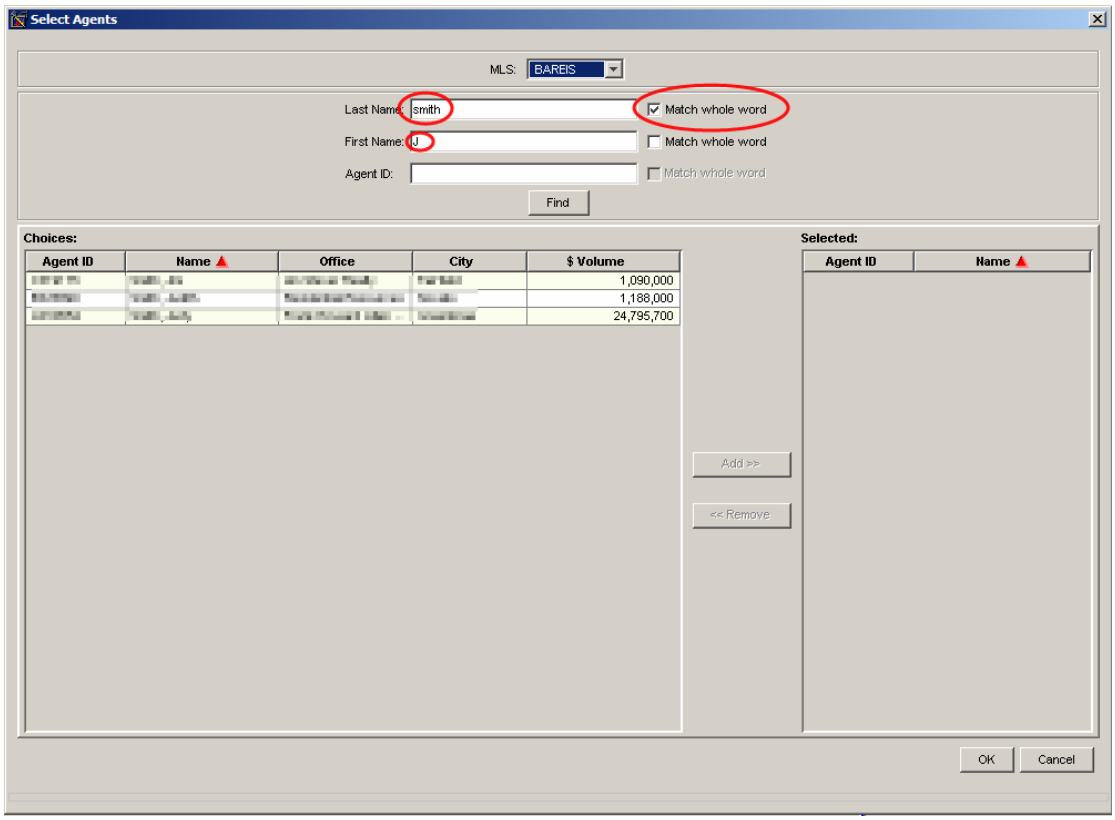
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Agent Name Search



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

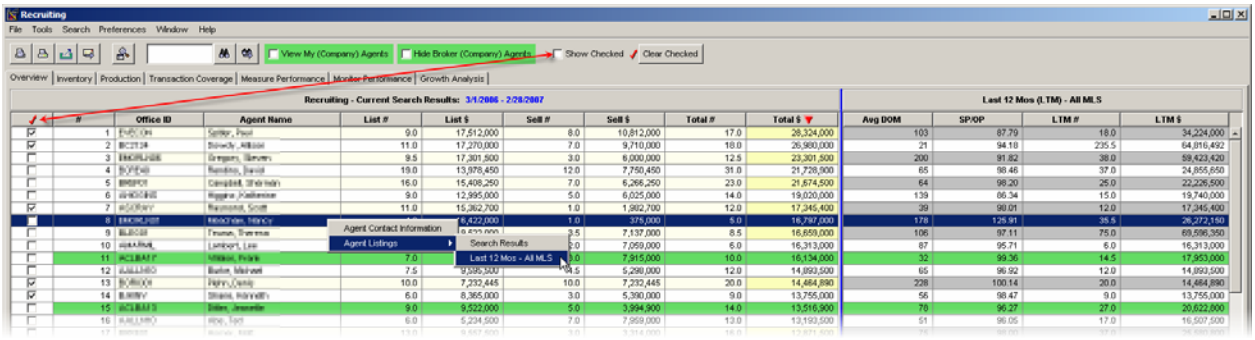
Enter all or part of a name to find the individual agents:



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Recruiting Search Results

- All agents displayed meet the search criteria; only agents that meet the search criteria are displayed. They are ranked by their Total $ Volume production within the criteria specified.
- Company agents are highlighted in green to indicate the company's current coverage within any given area(s).
- Company agents will not be highlighted in green when searching by your own office.
- Right-click information gives agent's company and office affiliation.
- Various forms of contact information are available depending on the data supplied by the MLS.
- Contact information is exportable to Excel for further use, e.g. mail-outs.
- Use the checkboxes on any tab to select and view only those agents on whom you wish to focus.



Overview

Provides a list of all agents who meet the search criteria, ranked by Total $ Volume.

Current Search Results: Data based on the search criteria.

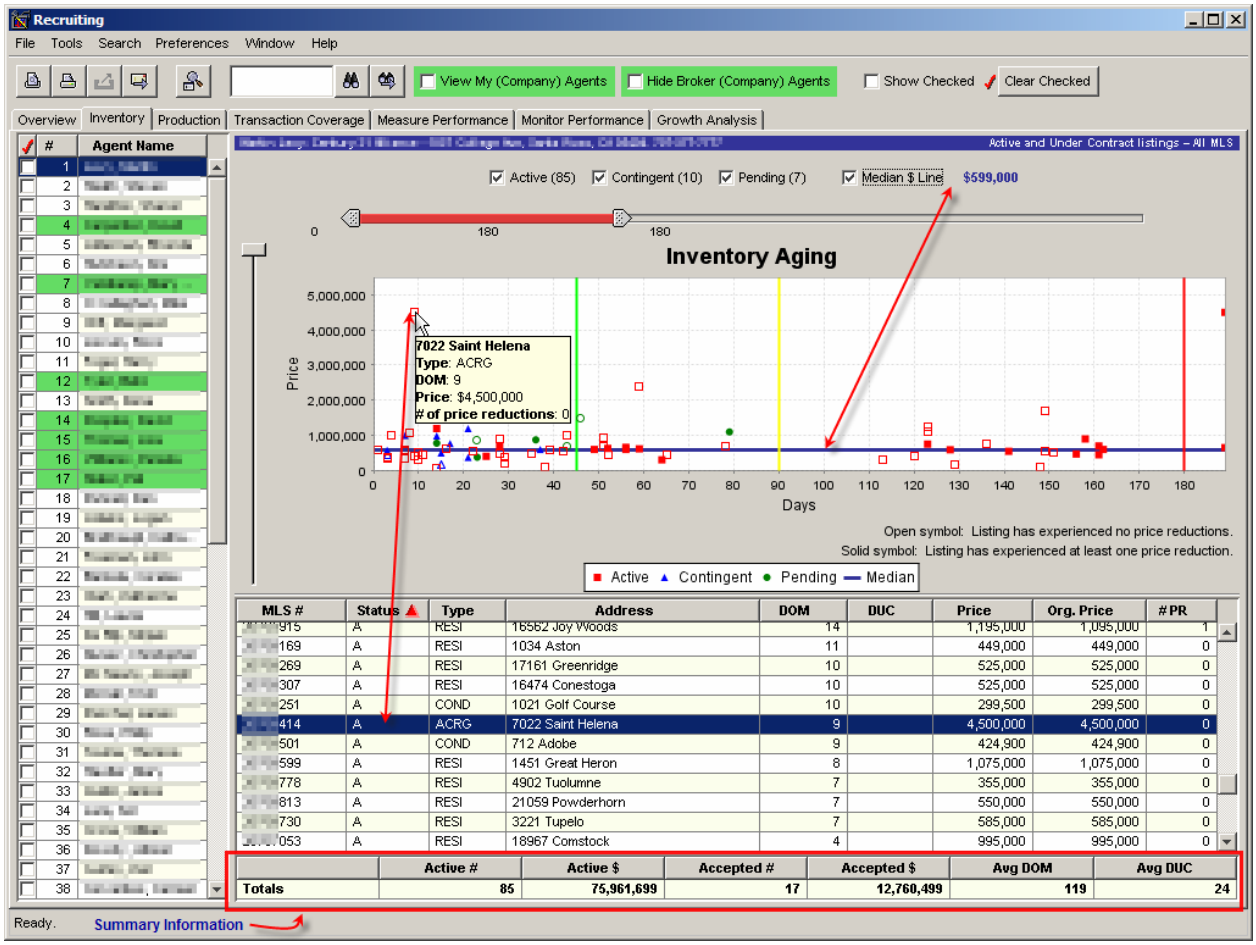
Last 12 Mos – All MLS: Data reflects all of an agent's transactions over the last 12 full months within the MLS. It is the data that is used for the analysis portion of the Recruiting tool: Production, Transaction Coverage, Measure Performance, Monitor Performance, and Growth Analysis.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Inventory

Provides information on the recruit's current book-of-business. The DOM aging information (scatter chart) can often give insight into the agent's ability to secure listings in the competitive market place at an appropriate price – because long DOM listings are tacit admission of the wrong price.

- Recruits can be viewed one-by-one by clicking on the individual rows.
- Place the mouse pointer on the chart symbol to display basic property & DOM information.
- Use the BrokerMetrics® right mouse click drill-down protocol to access the underlying record information.
- Summary information is located at the bottom of the chart table.
- See at a glance the median price for the agent's inventory.

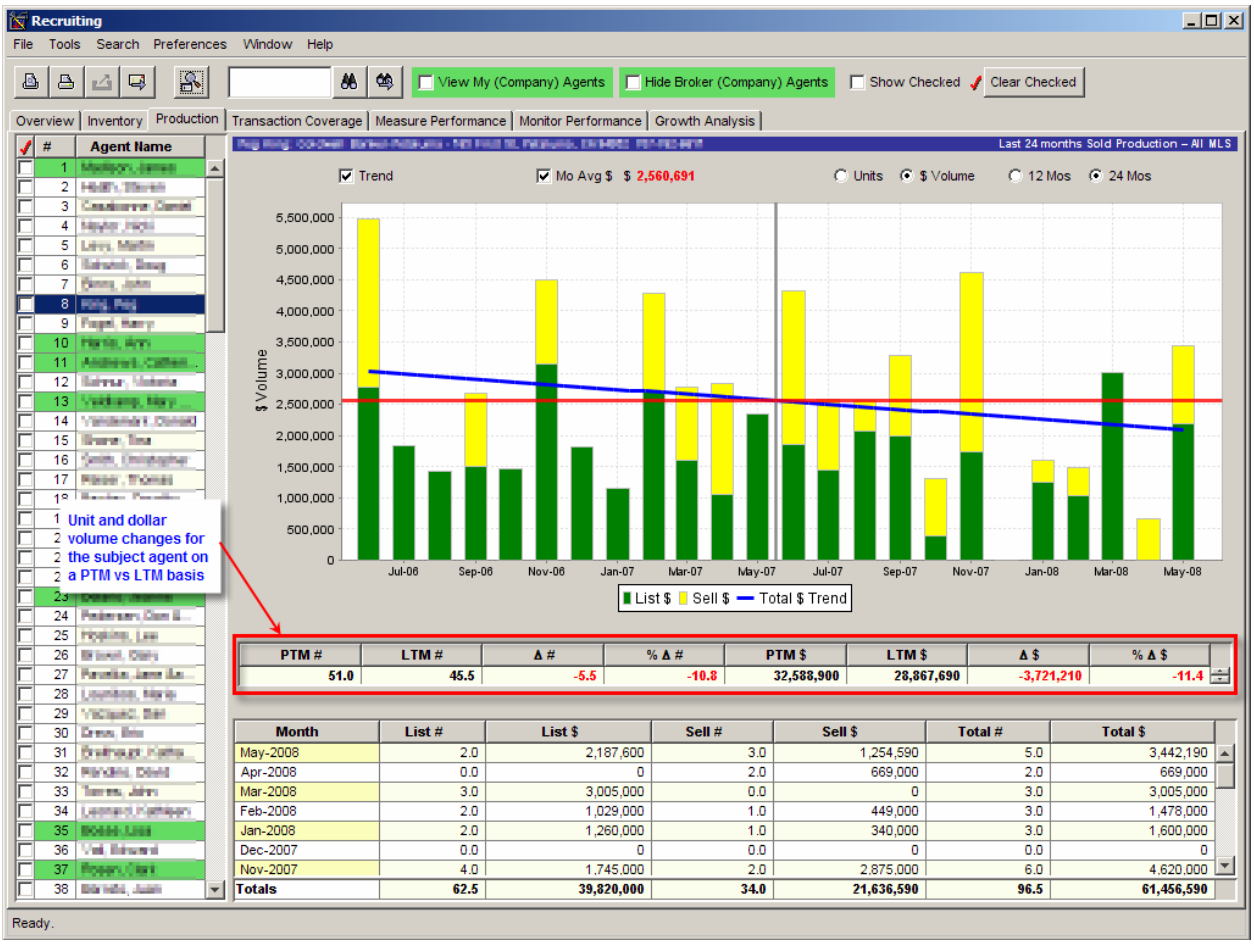

Recruiting
File Tools Search Preferences Window Help
View My (Company) Agents
Hide Broker (Company) Agents
Show Checked
Clear Checked
Overview Inventory Production Transaction Coverage Measure Performance Monitor Performance Growth Analysis
Active and Under Contract listings – All MLS
Active (85) Contingent (10) Pending (7) Median $ Line $599,000
Inventory Aging
Price
Days
7022 Saint Helena
Type: ACRG
DOM: 9
Price: $4,500,000
# of price reductions: 0
Open symbol: Listing has experienced no price reductions.
Solid symbol: Listing has experienced at least one price reduction.
Active Contingent Pending Median
Totals 85 75,961,699 17 12,760,499 119 24
Ready.
Summary Information

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Production

Provides a visual display of the recruit's production through the MLS.

- The last (12) or (24) month views are available using either $ Volume or # Unit measurements
- List side transactions (**green**) are visually separated from sell side transactions (**yellow**) to indicate distribution and overall transaction balance.
- Summary information is provided at the bottom of the table.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.


Recruiting
File Tools Search Preferences Window Help
View My (Company) Agents
Hide Broker (Company) Agents
Show Checked
Clear Checked
Overview Inventory Production Transaction Coverage Measure Performance Monitor Performance Growth Analysis
Last 24 months Sold Production – All MLS
Trend
Mo Avg $ $ 2,560,691
Units
$ Volume
12 Mos
24 Mos
$ Volume
List $ Sell $ Total $ Trend
Unit and dollar volume changes for the subject agent on a PTM vs LTM basis
PTM # LTM # Δ # % Δ # PTM $ LTM $ Δ $ % Δ $
51.0 45.5 -5.5 -10.8 32,588,900 28,867,690 -3,721,210 -11.4
Month List # List $ Sell # Sell $ Total # Total $
May-2008 2.0 2,187,600 3.0 1,254,590 5.0 3,442,190
Apr-2008 0.0 0 2.0 669,000 2.0 669,000
Mar-2008 3.0 3,005,000 0.0 0 3.0 3,005,000
Feb-2008 2.0 1,029,000 1.0 449,000 3.0 1,478,000
Jan-2008 2.0 1,260,000 1.0 340,000 3.0 1,600,000
Dec-2007 0.0 0 0.0 0 0.0 0
Nov-2007 4.0 1,745,000 2.0 2,875,000 6.0 4,620,000
Totals 62.5 39,820,000 34.0 21,636,590 96.5 61,456,590
Ready.

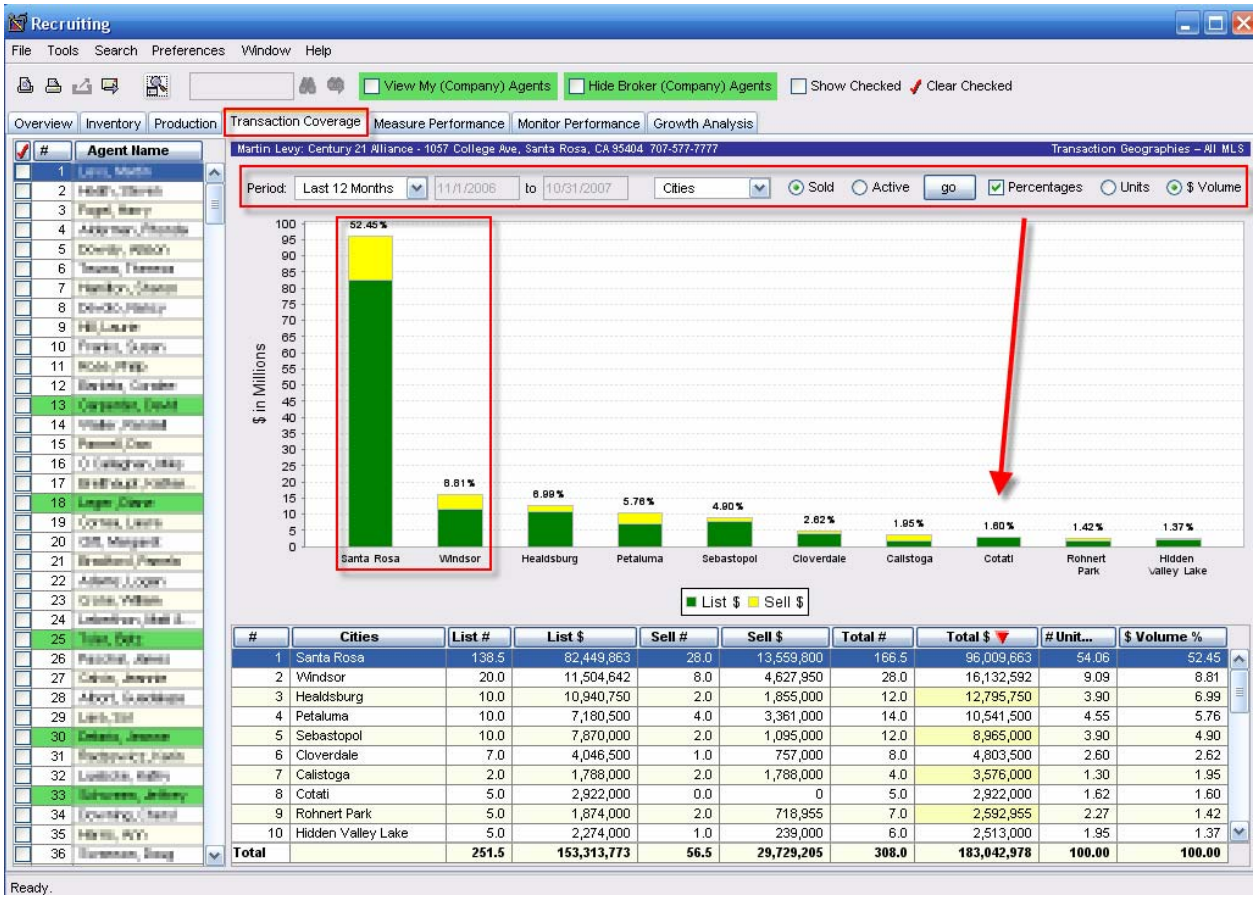
- View data for 12 or 24 full months.
- **Blue** trend line shows whether the agent's production has been trending upward or downward over the chosen time interval.
- **Red** line shows the agent's average sold $ Volume or # Units per month over the selected time period.
- 24-month view includes a grid displaying the unit and dollar volume changes for the subject agent on an LTM vs. PTM basis.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Transaction Coverage

Allows the office manager to pinpoint where potential recruits are most productive. The information on this tab will help you spot recruits with the potential to fill the recruiting needs identified with the My Office/Transaction Coverage tool.

- # Units or $ Volume displays.
- Sold (closed transaction) or Active listing coverage can be displayed.
- Any desired time frame may be used.
- The underlying records may be accessed via the right-click function.



#	Cities	List #	List $	Sell #	Sell $	Total #	Total $	# Unit...	$ Volume %
1	Santa Rosa	138.5	82,449,863	28.0	13,559,800	166.5	96,009,663	54.06	52.45
2	Windsor	20.0	11,504,642	8.0	4,627,950	28.0	16,132,592	9.09	8.81
3	Healdsburg	10.0	10,940,750	2.0	1,855,000	12.0	12,795,750	3.90	6.99
4	Petaluma	10.0	7,180,500	4.0	3,361,000	14.0	10,541,500	4.55	5.76
5	Sebastopol	10.0	7,870,000	2.0	1,095,000	12.0	8,965,000	3.90	4.90
6	Cloverdale	7.0	4,046,500	1.0	757,000	8.0	4,803,500	2.60	2.62
7	Calistoga	2.0	1,788,000	2.0	1,788,000	4.0	3,576,000	1.30	1.95
8	Cotati	5.0	2,922,000	0.0	0	5.0	2,922,000	1.62	1.60
9	Rohnert Park	5.0	1,874,000	2.0	718,955	7.0	2,592,955	2.27	1.42
10	Hidden Valley Lake	5.0	2,274,000	1.0	239,000	6.0	2,513,000	1.95	1.37
Total		**251.5**	**153,313,773**	**56.5**	**29,729,205**	**308.0**	**183,042,978**	**100.00**	**100.00**

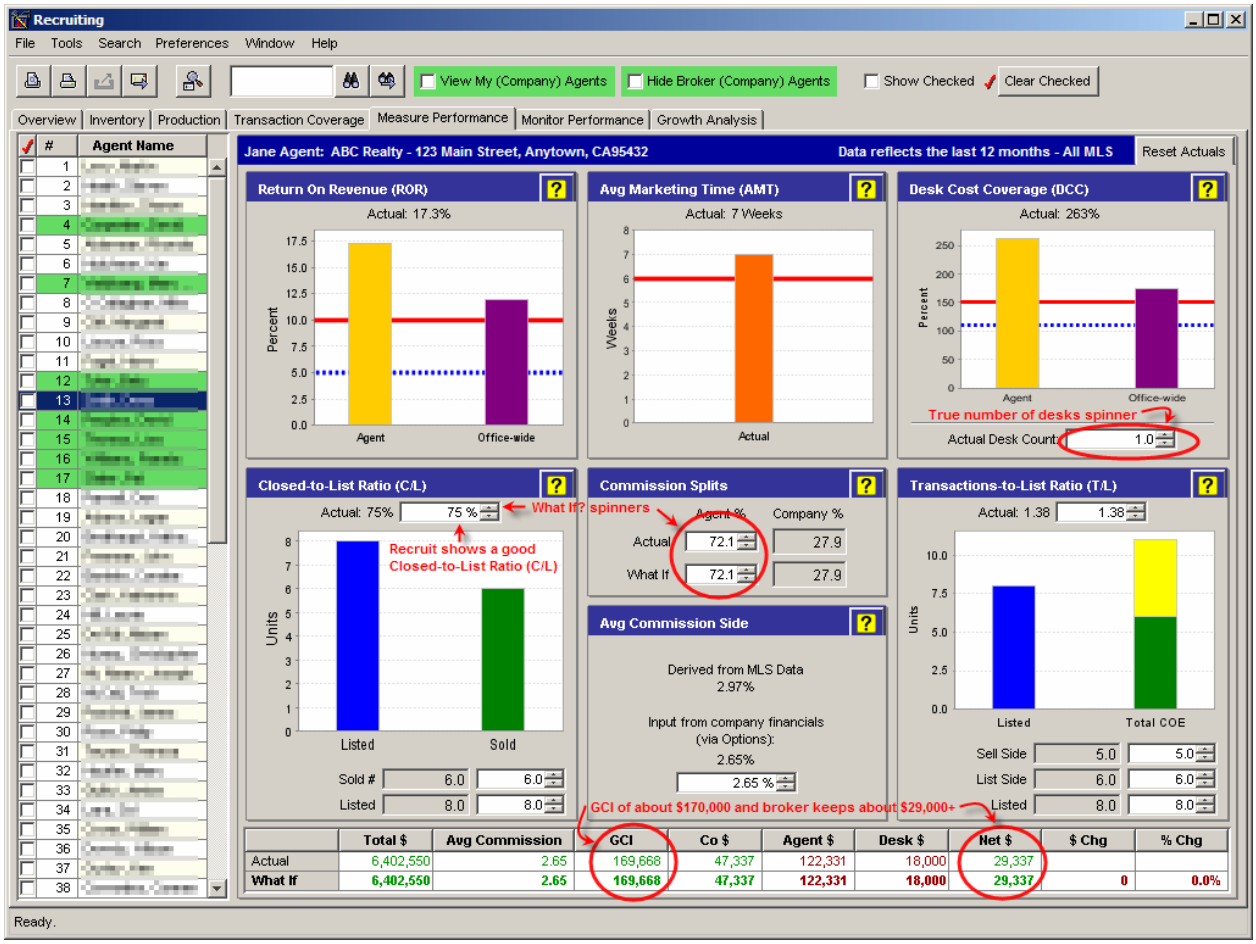
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Measure Performance

Allows you to evaluate recruits from a performance metric perspective.

- View a recruit's key operating metrics from the past (12) months – do they process their book of business efficiently?
- Measure a recruit's past performance relative to your company's goals and objectives – do they meet your standards?
- Use the "Spinners" to determine what the recruit's last 12 months MLS production would have meant to your office
    - Factor in their true desk cost, i.e. assistants
    - What commission split are they asking for?

*Now, look at the **Actual - Net $** column to see what it would have meant to your office?*

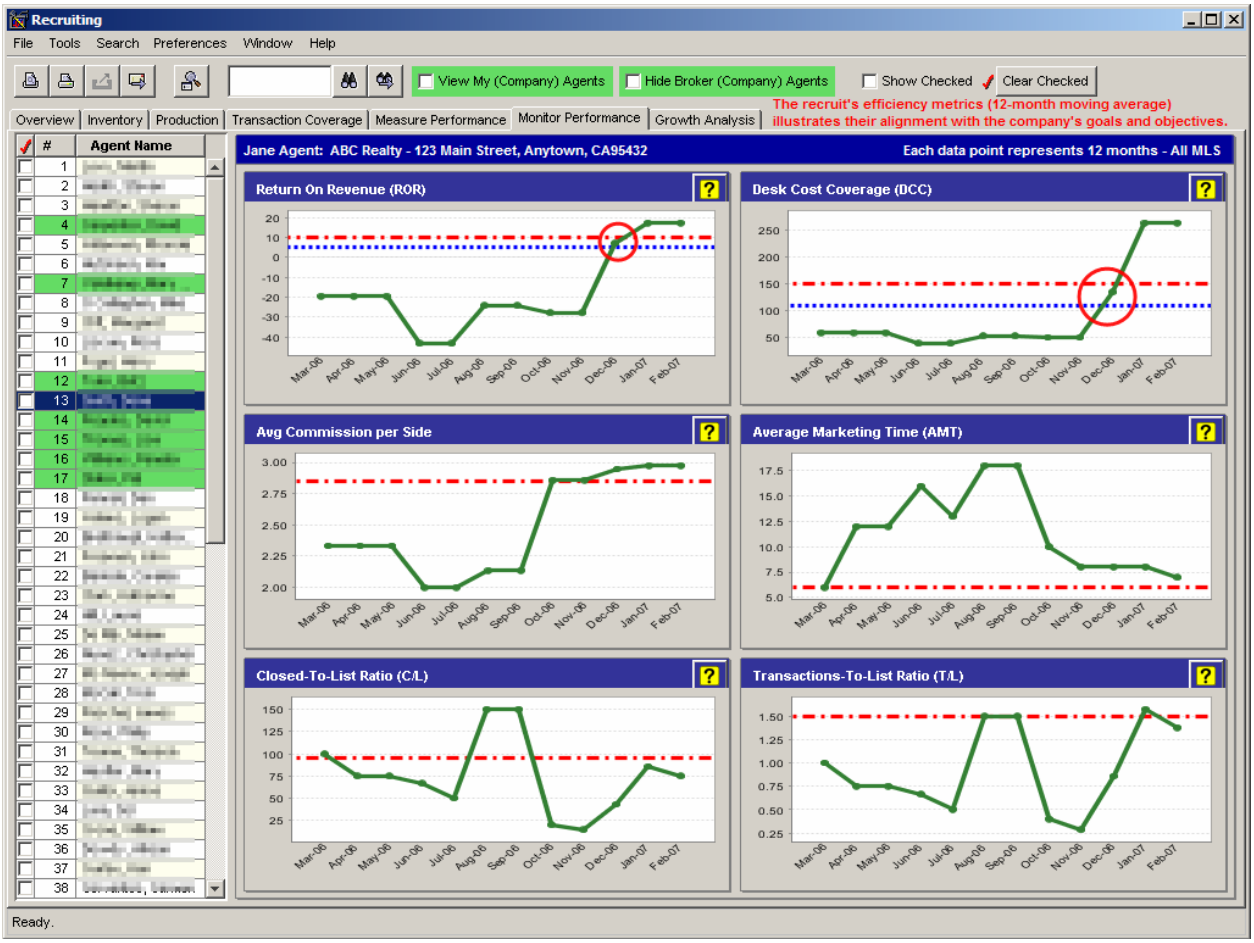

Recruiting
File Tools Search Preferences Window Help
View My (Company) Agents
Hide Broker (Company) Agents
Show Checked
Clear Checked
Overview Inventory Production Transaction Coverage Measure Performance Monitor Performance Growth Analysis
Jane Agent: ABC Realty - 123 Main Street, Anytown, CA95432
Data reflects the last 12 months - All MLS
Reset Actuals
Return On Revenue (ROR)
Actual: 17.3%
Avg Marketing Time (AMT)
Actual: 7 Weeks
Desk Cost Coverage (DCC)
Actual: 263%
True number of desks spinner
Actual Desk Count
Closed-to-List Ratio (C/L)
Actual: 75%
What If? spinners
Recruit shows a good Closed-to-List Ratio (C/L)
Commission Splits
Agent %
Company %
Actual
What If
Avg Commission Side
Derived from MLS Data
2.97%
Input from company financials (via Options):
2.65%
Transactions-to-List Ratio (T/L)
Actual: 1.38
Sell Side
List Side
GCI of about $170,000 and broker keeps about $29,000+
Total $ Avg Commission GCI Co $ Agent $ Desk $ Net $ $ Chg % Chg
Actual 6,402,550 2.65 169,668 47,337 122,331 18,000 29,337
What If 6,402,550 2.65 169,668 47,337 122,331 18,000 29,337 0 0.0%
Ready.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Monitor Performance

Looks at the twelve-month rolling average of the recruits' efficiency metrics to see the consistency of their performance.

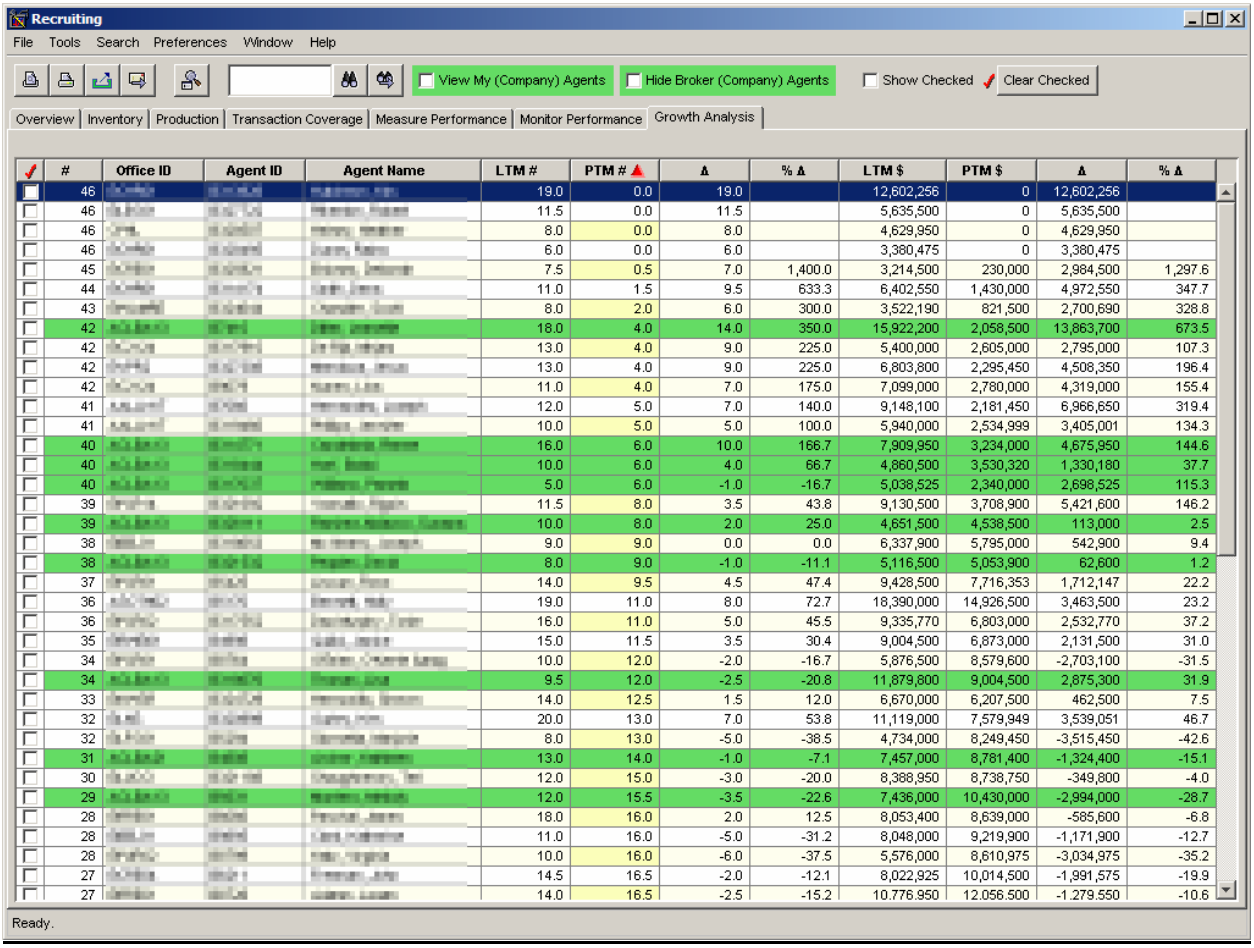
- Company goals are displayed using red lines.
- Dotted blue lines are company minimum targets.
- The (12) month moving average is a good indicator of future performance.


Recruiting
File Tools Search Preferences Window Help
View My (Company) Agents
Hide Broker (Company) Agents
Show Checked
Clear Checked
Overview Inventory Production Transaction Coverage Measure Performance Monitor Performance Growth Analysis
The recruit's efficiency metrics (12-month moving average) illustrates their alignment with the company's goals and objectives.
Agent Name
Jane Agent: ABC Realty - 123 Main Street, Anytown, CA95432
Each data point represents 12 months - All MLS
Return On Revenue (ROR)
Desk Cost Coverage (DCC)
Avg Commission per Side
Average Marketing Time (AMT)
Closed-To-List Ratio (C/L)
Transactions-To-List Ratio (T/L)
Ready.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Growth Analysis

- Automatically calculates the unit and dollar volume changes for any agent in the MLS on an LTM vs. PTM basis.
- The Growth Analysis tab has been set so that agents <u>new to the MLS</u> will "float" to the top for easy identification. (Default settings: PTM = 0; LTM in descending order of unit production)


Recruiting
File Tools Search Preferences Window Help
View My (Company) Agents
Hide Broker (Company) Agents
Show Checked
Clear Checked
Overview | Inventory | Production | Transaction Coverage | Measure Performance | Monitor Performance | Growth Analysis
Ready.

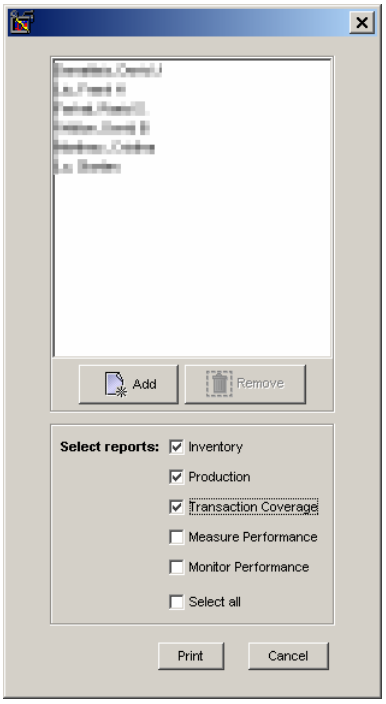
#	Office ID	Agent ID	Agent Name	LTM #	PTM #	Δ	% Δ	LTM $	PTM $	Δ	% Δ
46				19.0	0.0	19.0		12,602,256	0	12,602,256	
46				11.5	0.0	11.5		5,635,500	0	5,635,500	
46				8.0	0.0	8.0		4,629,950	0	4,629,950	
46				6.0	0.0	6.0		3,380,475	0	3,380,475	
45				7.5	0.5	7.0	1,400.0	3,214,500	230,000	2,984,500	1,297.6
44				11.0	1.5	9.5	633.3	6,402,550	1,430,000	4,972,550	347.7
43				8.0	2.0	6.0	300.0	3,522,190	821,500	2,700,690	328.8
42				18.0	4.0	14.0	350.0	15,922,200	2,058,500	13,863,700	673.5
42				13.0	4.0	9.0	225.0	5,400,000	2,605,000	2,795,000	107.3
42				13.0	4.0	9.0	225.0	6,803,800	2,295,450	4,508,350	196.4
42				11.0	4.0	7.0	175.0	7,099,000	2,780,000	4,319,000	155.4
41				12.0	5.0	7.0	140.0	9,148,100	2,181,450	6,966,650	319.4
41				10.0	5.0	5.0	100.0	5,940,000	2,534,999	3,405,001	134.3
40				16.0	6.0	10.0	166.7	7,909,950	3,234,000	4,675,950	144.6
40				10.0	6.0	4.0	66.7	4,860,500	3,530,320	1,330,180	37.7
40				5.0	6.0	-1.0	-16.7	5,038,525	2,340,000	2,698,525	115.3
39				11.5	8.0	3.5	43.8	9,130,500	3,708,900	5,421,600	146.2
39				10.0	8.0	2.0	25.0	4,651,500	4,538,500	113,000	2.5
38				9.0	9.0	0.0	0.0	6,337,900	5,795,000	542,900	9.4
38				8.0	9.0	-1.0	-11.1	5,116,500	5,053,900	62,600	1.2
37				14.0	9.5	4.5	47.4	9,428,500	7,716,353	1,712,147	22.2
36				19.0	11.0	8.0	72.7	18,390,000	14,926,500	3,463,500	23.2
36				16.0	11.0	5.0	45.5	9,335,770	6,803,000	2,532,770	37.2
35				15.0	11.5	3.5	30.4	9,004,500	6,873,000	2,131,500	31.0
34				10.0	12.0	-2.0	-16.7	5,876,500	8,579,600	-2,703,100	-31.5
34				9.5	12.0	-2.5	-20.8	11,879,800	9,004,500	2,875,300	31.9
33				14.0	12.5	1.5	12.0	6,670,000	6,207,500	462,500	7.5
32				20.0	13.0	7.0	53.8	11,119,000	7,579,949	3,539,051	46.7
32				8.0	13.0	-5.0	-38.5	4,734,000	8,249,450	-3,515,450	-42.6
31				13.0	14.0	-1.0	-7.1	7,457,000	8,781,400	-1,324,400	-15.1
30				12.0	15.0	-3.0	-20.0	8,388,950	8,738,750	-349,800	-4.0
29				12.0	15.5	-3.5	-22.6	7,436,000	10,430,000	-2,994,000	-28.7
28				18.0	16.0	2.0	12.5	8,053,400	8,639,000	-585,600	-6.8
28				11.0	16.0	-5.0	-31.2	8,048,000	9,219,900	-1,171,900	-12.7
28				10.0	16.0	-6.0	-37.5	5,576,000	8,610,975	-3,034,975	-35.2
27				14.5	16.5	-2.0	-12.1	8,022,925	10,014,500	-1,991,575	-19.9
27				14.0	16.5	-2.5	-15.2	10,776,950	12,056,500	-1,279,550	-10.6

<u>Helpful Hint</u>: First click on Growth Analysis; and then on the Production tab. By simply "walking" down the rows you can view each "new" agent's production on a monthly basis over the last year.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

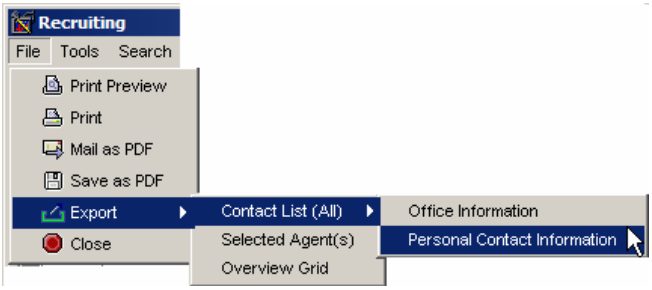
Reports

Select multiple reports for multiple agents:



Exports

Export office and personal contact information for all of the agents that met your search criteria or only for certain agents you select



Right-click on an agent's name to view (and then export)

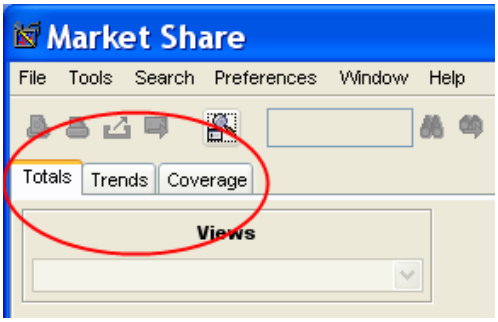
- Contact information
- Listings
  - For the time period specified in the search criteria
  - For the previous 12 months.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Market Share Searches

Provides production measurements for all offices, brokerages, Custom Market Share (CMS) , or Market Share Coverage sets((e.g. companies & brands) within the MLS using any criteria the user desires.

Three different market share functions (Totals, Trends, Coverage) will be accessed via individual tabs. You can toggle back and forth to all three report views by navigating between tabs.



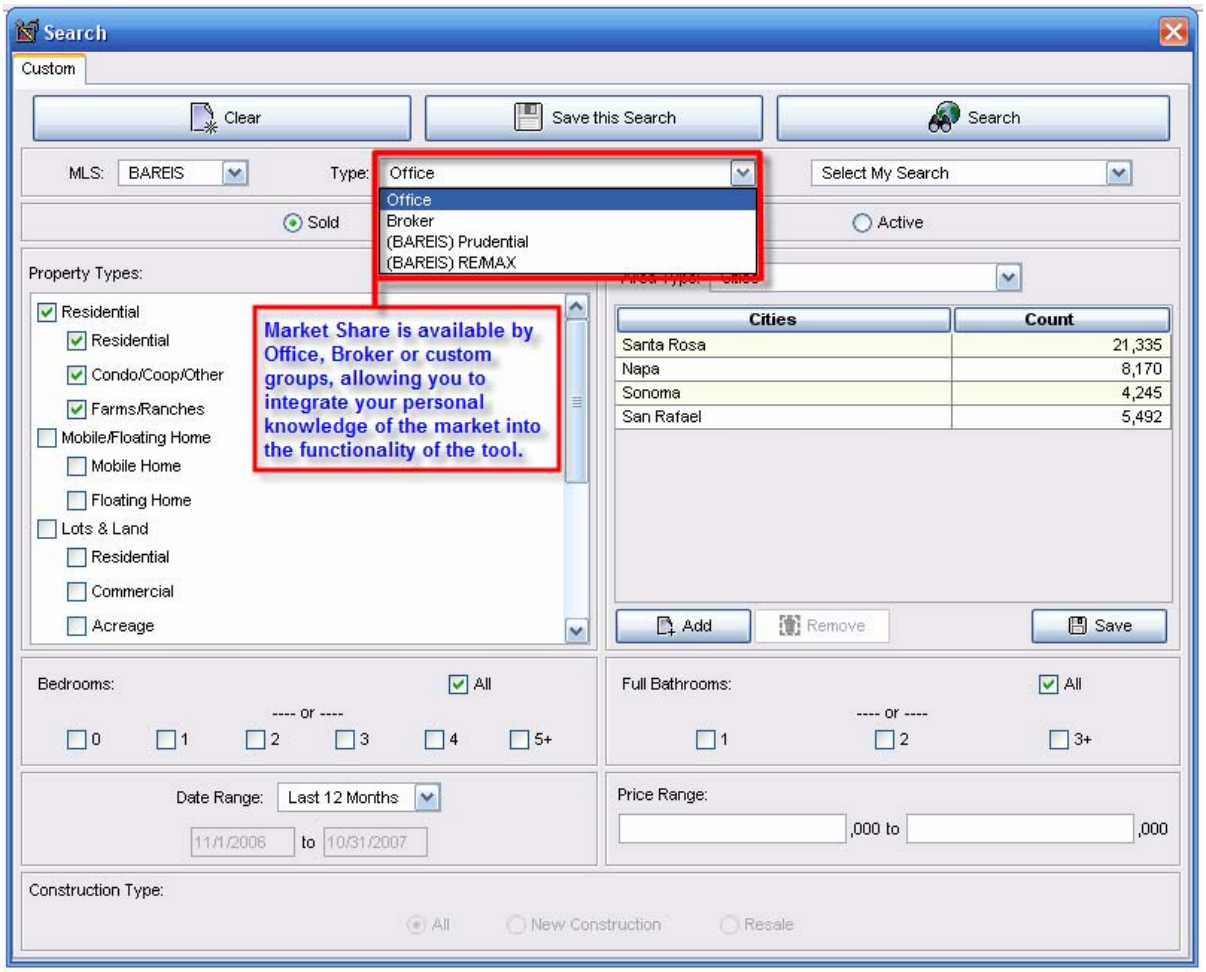
Market Share Totals

Traditional market share measurements by $ Volume or # Units.

Search Screen

- Property and Area Types mirror your MLS.
- Date Range: 24 months of data is available.
- Search Types: Office, Broker, or Custom Market Share groups (e.g. Major Brands).
- Status area shows the progress of your search. Stop the search at any time by clicking the **Cancel** button to go back and change the criteria.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

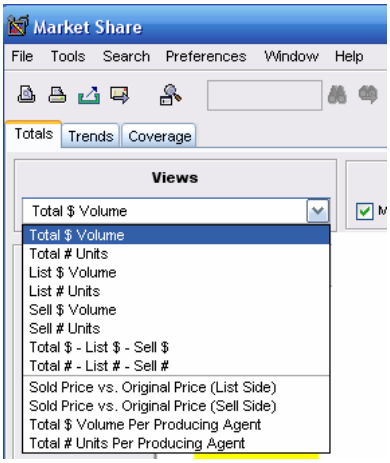


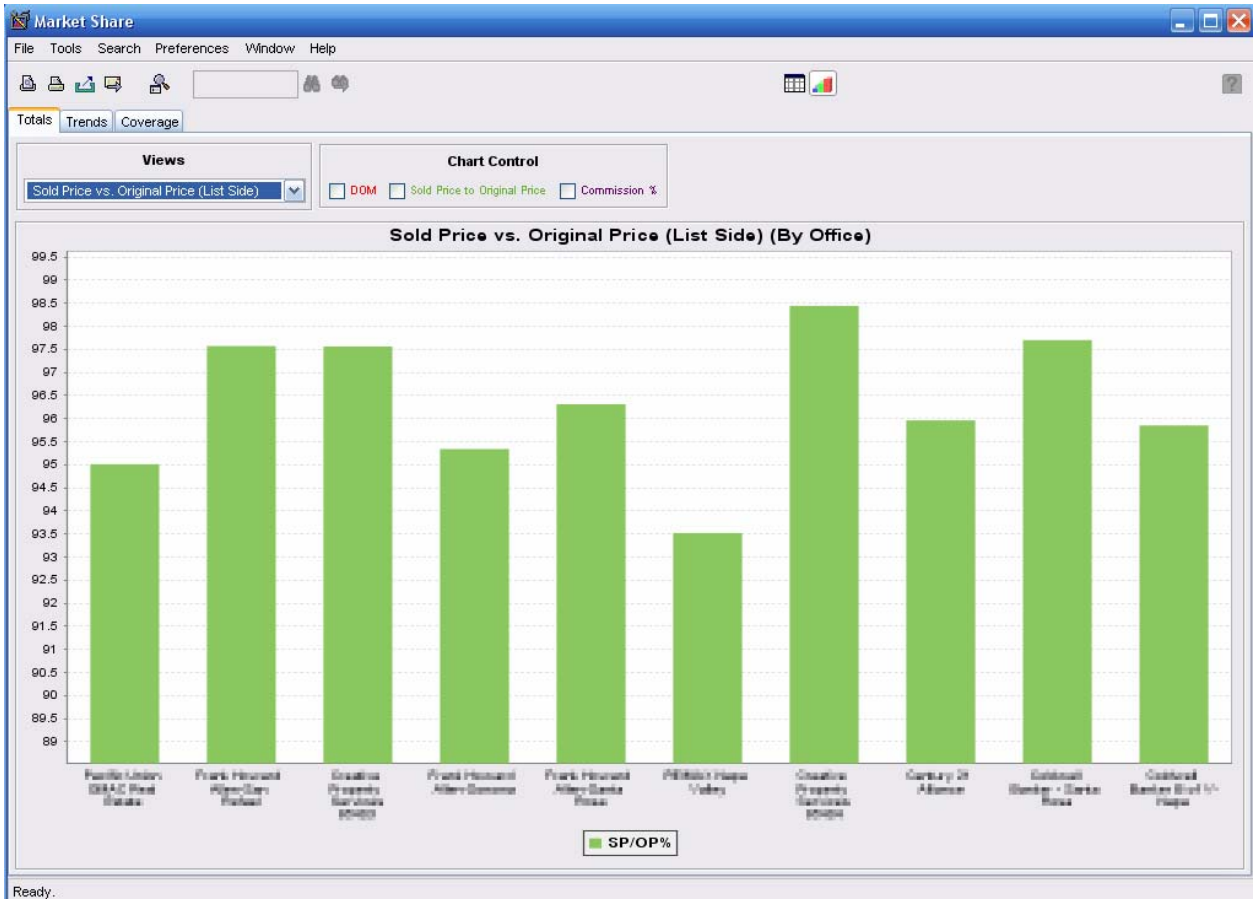
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Search Results

Displayed in two forms: chart and grid. Toggle between them using the chart and grid buttons.

- Chart form is the default display, grid form is accessed via the toggle button.
- Print and email functionality is available.
- Multiple report formats are available, including:
  - $ Volume and # Units for List-side only and Sell-side only.
  - List Side demonstrates your success in obtaining the highest prices relative to the original listing price for your sellers (List Side).
  - Sell Side displays your ability to obtain the lowest prices relative to the original listing price for your buyers.
- Sold Price vs. Original Price (List Side and Sell Side)

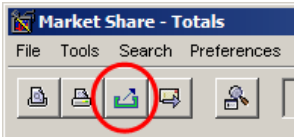

Market Share
File Tools Search Preferences Window Help
Totals Trends Coverage
Views
Total $ Volume
Total $ Volume
Total # Units
List $ Volume
List # Units
Sell $ Volume
Sell # Units
Total $ - List $ - Sell $
Total # - List # - Sell #
Sold Price vs. Original Price (List Side)
Sold Price vs. Original Price (Sell Side)
Total $ Volume Per Producing Agent
Total # Units Per Producing Agent



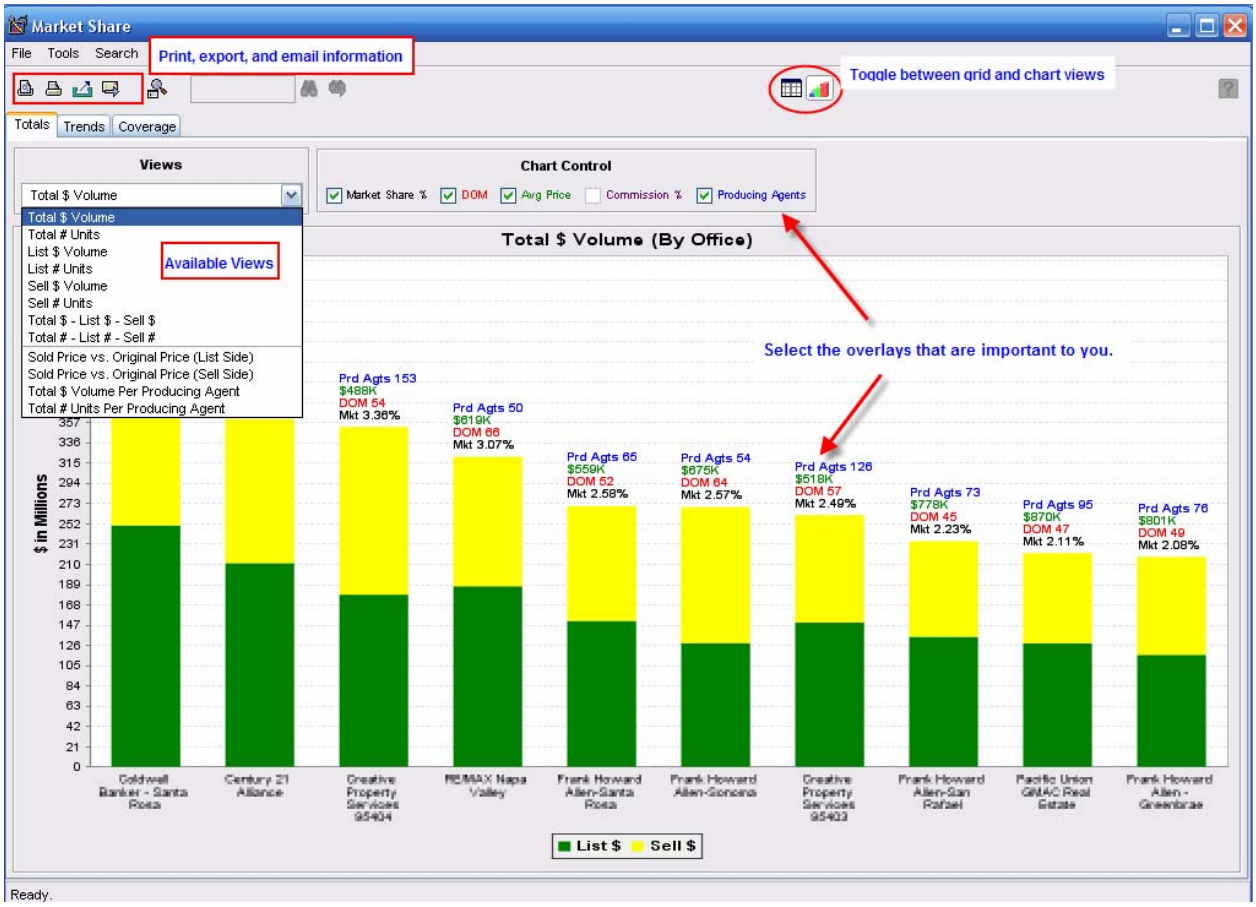
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired.

Export the entire grid with the click of a button. The export file will contain the exact data in the grid from which you initiated the export.



Charts

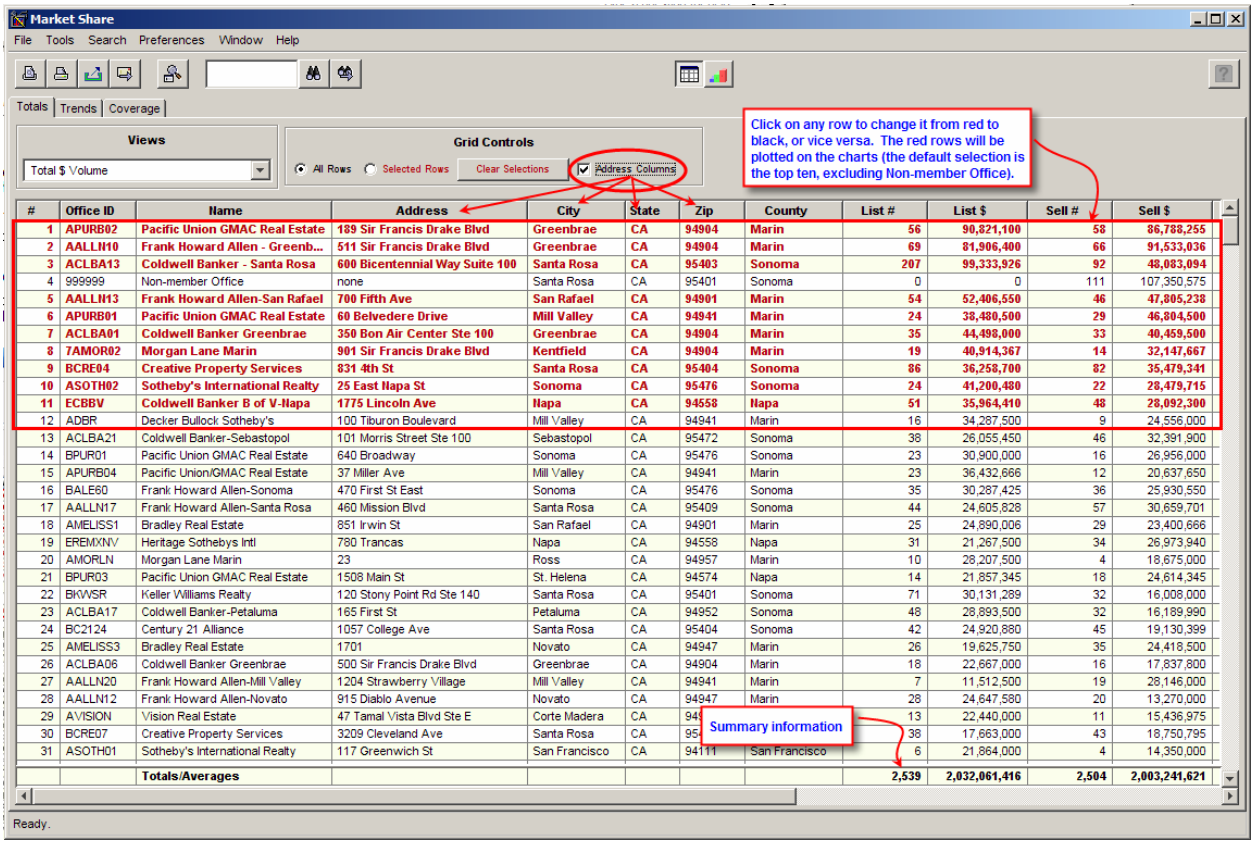


- Rows that are selected in the grid (see next page) will be displayed on the chart.
- Checkboxes above the chart allow you to display only the information that is important to you.
- Underlying information is accessed and displayed via the right mouse click function on the chart bars.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Grid

- Grid format displays all offices, brokerages, or custom market share groups that did at least one side of a transaction within the search criteria used (see example below).
- Top 10 rows (excluding non-MLS) are selected (bold red text) by default for convenience.
- The rows that are selected (by default or via mouse click) will be charted – chart esthetics will help you determine the appropriate limit.
- Use the Grid Controls to show or conceal highlighted rows and address columns.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable as a csv file for use in any database program (e.g. Excel) if desired.
- Check or uncheck the Address Columns checkbox to display or hide this information.


Market Share
File Tools Search Preferences Window Help
Totals Trends Coverage
Views
Total $ Volume
Grid Controls
All Rows
Selected Rows
Clear Selections
Address Columns
Click on any row to change it from red to black, or vice versa. The red rows will be plotted on the charts (the default selection is the top ten, excluding Non-member Office).
Summary information
Ready.

#	Office ID	Name	Address	City	State	Zip	County	List #	List $	Sell #	Sell $
1	APURB02	Pacific Union GMAC Real Estate	189 Sir Francis Drake Blvd	Greenbrae	CA	94904	Marin	56	90,821,100	58	86,788,255
2	AALLN10	Frank Howard Allen - Greenb...	511 Sir Francis Drake Blvd	Greenbrae	CA	94904	Marin	69	81,906,400	66	91,533,036
3	ACLBA13	Coldwell Banker - Santa Rosa	600 Bicentennial Way Suite 100	Santa Rosa	CA	95403	Sonoma	207	99,333,926	92	48,083,094
4	999999	Non-member Office	none	Santa Rosa	CA	95401	Sonoma	0	0	111	107,350,575
5	AALLN13	Frank Howard Allen-San Rafael	700 Fifth Ave	San Rafael	CA	94901	Marin	54	52,406,550	46	47,805,238
6	APURB01	Pacific Union GMAC Real Estate	60 Belvedere Drive	Mill Valley	CA	94941	Marin	24	38,480,500	29	46,804,500
7	ACLBA01	Coldwell Banker Greenbrae	350 Bon Air Center Ste 100	Greenbrae	CA	94904	Marin	35	44,498,000	33	40,459,500
8	7AMOR02	Morgan Lane Marin	901 Sir Francis Drake Blvd	Kentfield	CA	94904	Marin	19	40,914,367	14	32,147,667
9	BCRE04	Creative Property Services	831 4th St	Santa Rosa	CA	95404	Sonoma	86	36,258,700	82	35,479,341
10	ASOTH02	Sotheby's International Realty	25 East Napa St	Sonoma	CA	95476	Sonoma	24	41,200,480	22	28,479,715
11	ECBBV	Coldwell Banker B of V-Napa	1775 Lincoln Ave	Napa	CA	94558	Napa	51	35,964,410	48	28,092,300
12	ADBR	Decker Bullock Sotheby's	100 Tiburon Boulevard	Mill Valley	CA	94941	Marin	16	34,287,500	9	24,556,000
13	ACLBA21	Coldwell Banker-Sebastopol	101 Morris Street Ste 100	Sebastopol	CA	95472	Sonoma	38	26,055,450	46	32,391,900
14	BPUR01	Pacific Union GMAC Real Estate	640 Broadway	Sonoma	CA	95476	Sonoma	23	30,900,000	16	26,956,000
15	APURB04	Pacific Union/GMAC Real Estate	37 Miller Ave	Mill Valley	CA	94941	Marin	23	36,432,666	12	20,637,650
16	BALE60	Frank Howard Allen-Sonoma	470 First St East	Sonoma	CA	95476	Sonoma	35	30,287,425	36	25,930,550
17	AALLN17	Frank Howard Allen-Santa Rosa	460 Mission Blvd	Santa Rosa	CA	95409	Sonoma	44	24,605,828	57	30,659,701
18	AMELISS1	Bradley Real Estate	851 Irwin St	San Rafael	CA	94901	Marin	25	24,890,006	29	23,400,666
19	EREMXNV	Heritage Sothebys Intl	780 Trancas	Napa	CA	94558	Napa	31	21,267,500	34	26,973,940
20	AMORLN	Morgan Lane Marin	23	Ross	CA	94957	Marin	10	28,207,500	4	18,675,000
21	BPUR03	Pacific Union GMAC Real Estate	1508 Main St	St. Helena	CA	94574	Napa	14	21,857,345	18	24,614,345
22	BKWSR	Keller Williams Realty	120 Stony Point Rd Ste 140	Santa Rosa	CA	95401	Sonoma	71	30,131,289	32	16,008,000
23	ACLBA17	Coldwell Banker-Petaluma	165 First St	Petaluma	CA	94952	Sonoma	48	28,893,500	32	16,189,990
24	BC2124	Century 21 Alliance	1057 College Ave	Santa Rosa	CA	95404	Sonoma	42	24,920,880	45	19,130,399
25	AMELISS3	Bradley Real Estate	1701	Novato	CA	94947	Marin	26	19,625,750	35	24,418,500
26	ACLBA06	Coldwell Banker Greenbrae	500 Sir Francis Drake Blvd	Greenbrae	CA	94904	Marin	18	22,667,000	16	17,837,800
27	AALLN20	Frank Howard Allen-Mill Valley	1204 Strawberry Village	Mill Valley	CA	94941	Marin	7	11,512,500	19	28,146,000
28	AALLN12	Frank Howard Allen-Novato	915 Diablo Avenue	Novato	CA	94947	Marin	28	24,647,580	20	13,270,000
29	AVISION	Vision Real Estate	47 Tamal Vista Blvd Ste E	Corte Madera	CA	94		13	22,440,000	11	15,436,975
30	BCRE07	Creative Property Services	3209 Cleveland Ave	Santa Rosa	CA	95		38	17,663,000	43	18,750,795
31	ASOTH01	Sotheby's International Realty	117 Greenwich St	San Francisco	CA	94111	San Francisco	6	21,864,000	4	14,350,000
		Totals/Averages						**2,539**	**2,032,061,416**	**2,504**	**2,003,241,621**

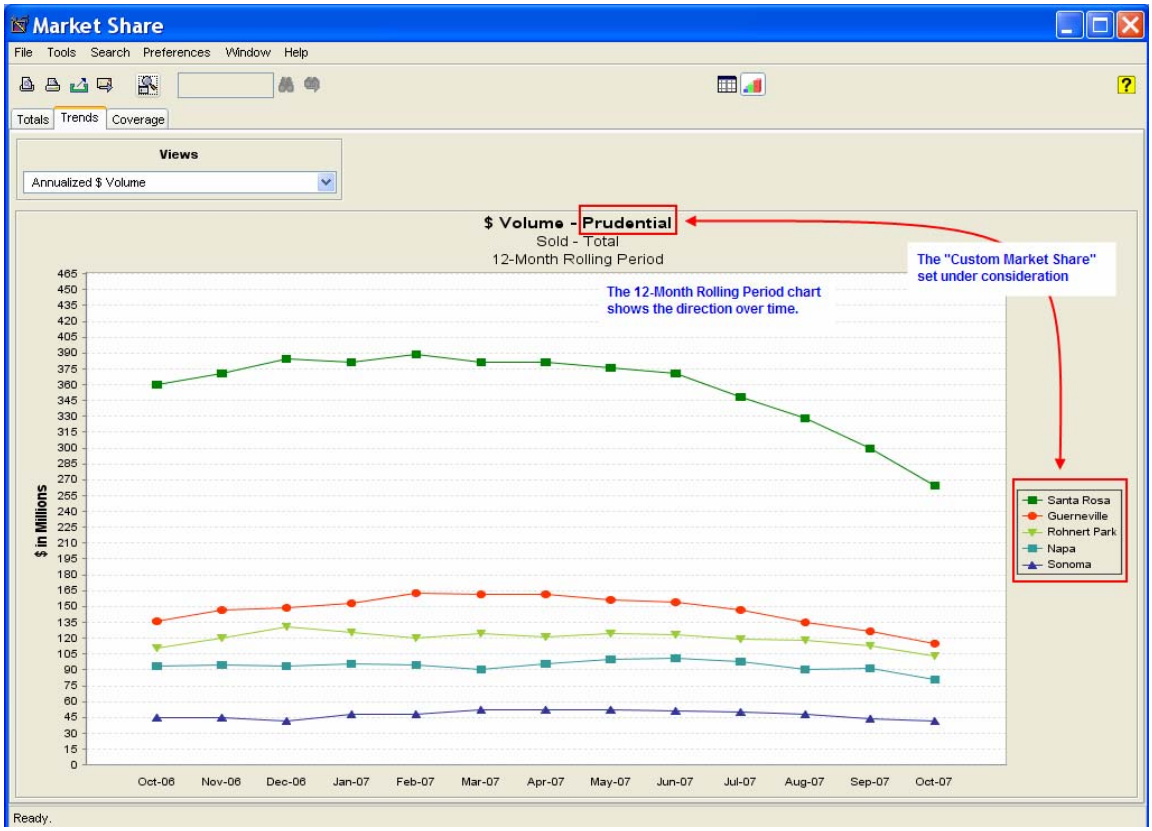
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Market Share Trends

Measures market share units, dollar volume, and their percentages over time.

12-Month Rolling Period View

Chart



Charts twelve-month production totals for the previous twelve full months for each of the offices, brokers or Custom Market Share Groups.

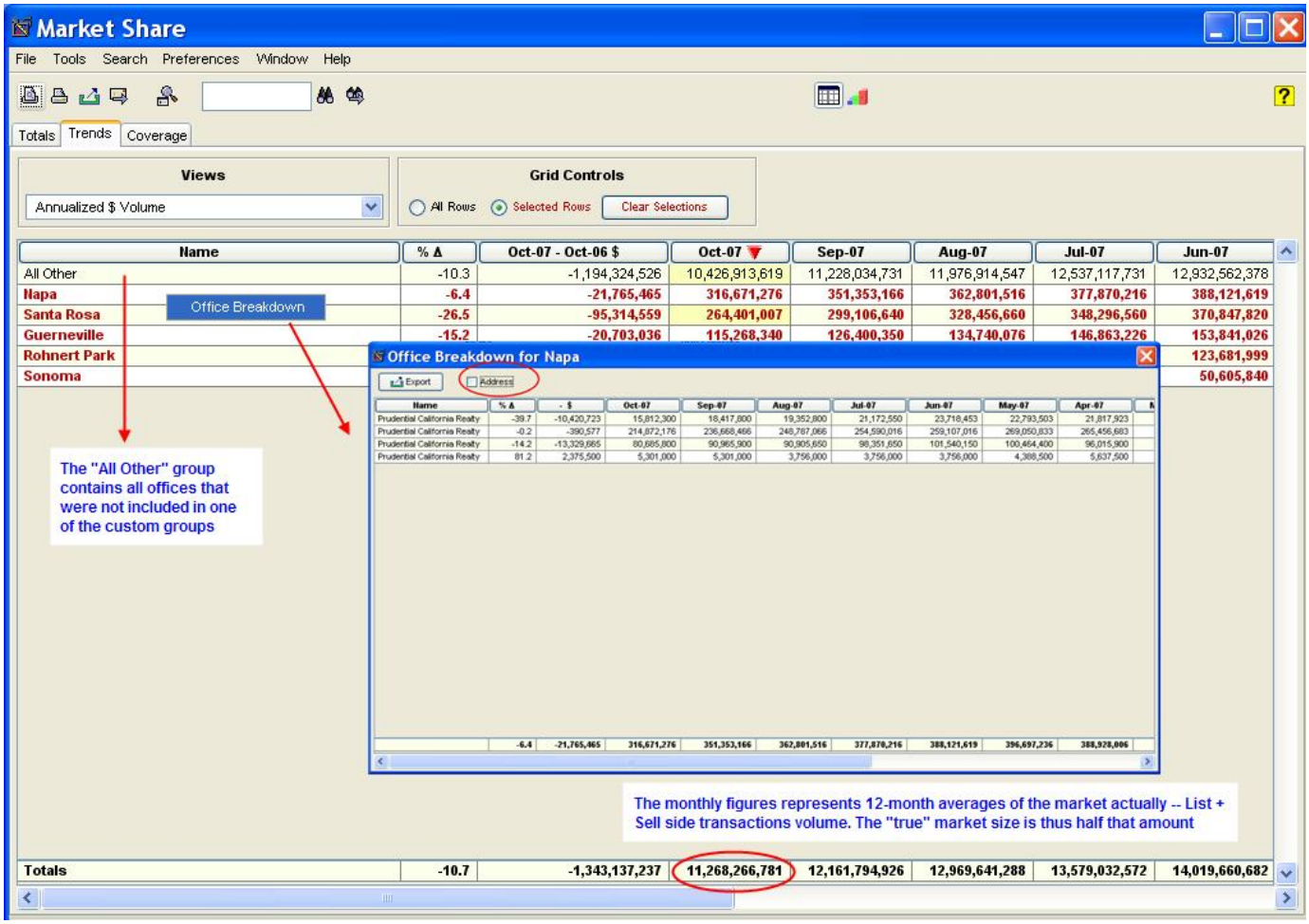
Each data point (node) is comprised of 12 consecutive months of data, "rolling" forward in time on a monthly basis. The value associated with each node encompasses that month's data plus all of the data from the preceding 11 months. For example, the Oct-07 data point begins on 11/1/06 and ends on 10/31/07; it includes all of the data for the following months:

1. Nov-06
2. Dec-06
3. Jan-07
4. Feb-07
5. Marl-07
6. Apr-07
7. May-07
8. Jun-07
9. Jul-07
10. Aug-07
11. Sept-07
12. Oct-07

The first five entities, ranked on the most recent month's values, are plotted on the chart by default. All entities are shown in the grid. Mouse over the line nodes to display the values.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Grid


Market Share
File Tools Search Preferences Window Help
Totals Trends Coverage
Views
Annualized $ Volume
Grid Controls
All Rows Selected Rows Clear Selections
Name % Δ Oct-07 - Oct-06 $ Oct-07 Sep-07 Aug-07 Jul-07 Jun-07
All Other -10.3 -1,194,324,526 10,426,913,619 11,228,034,731 11,976,914,547 12,537,117,731 12,932,562,378
Napa -6.4 -21,765,465 316,671,276 351,353,166 362,801,516 377,870,216 388,121,619
Santa Rosa -26.5 -95,314,559 264,401,007 299,106,640 328,456,660 348,296,560 370,847,820
Guerneville -15.2 -20,703,036 115,268,340 126,400,350 134,740,076 146,863,226 153,841,026
Rohnert Park 123,681,999
Sonoma 50,605,840
Totals -10.7 -1,343,137,237 11,268,266,781 12,161,794,926 12,969,641,288 13,579,032,572 14,019,660,682
Office Breakdown
Office Breakdown for Napa
Export
Address
The "All Other" group contains all offices that were not included in one of the custom groups
The monthly figures represents 12-month averages of the market actually -- List + Sell side transactions volume. The "true" market size is thus half that amount

- Market share grid allows for right mouse click drill down functionality.
- Strings of zeros beginning in the left most column are indicative of new office formation for any given group (brand or company).
- Summary totals = % growth for entire market (as defined by the search criteria).
- Individual rows = % growth for that company, office or custom group.
- Right mouse click drill-down functionality is available here.
    - Office Detail - specific office information.
    - Office Listings – audit trail to the records.
- The All Other group contains every office in the MLS that is not included in one of the named custom groups.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Comparison Period Views

Charts

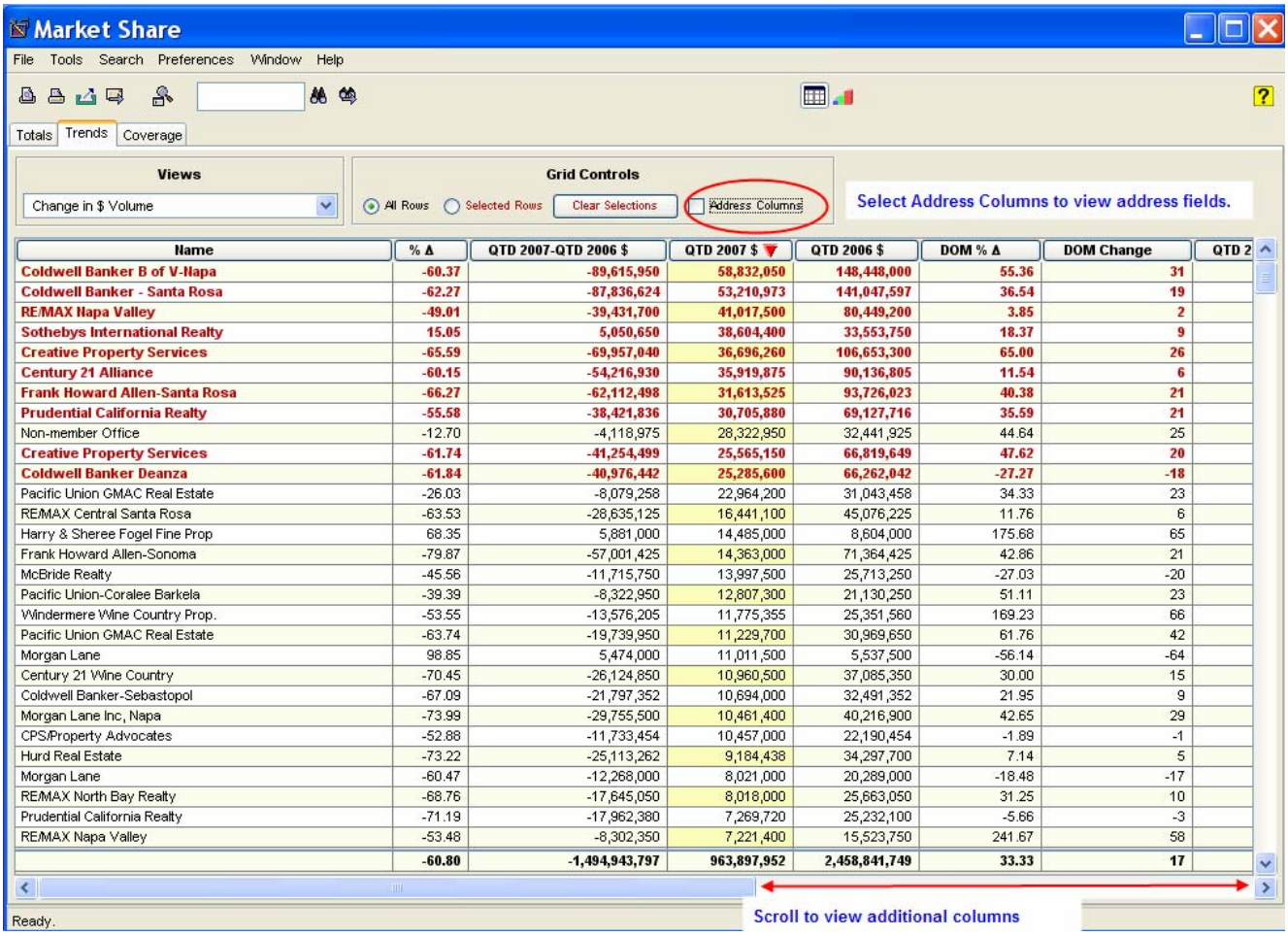
These views display two bars for each entity. Together, the bars represent a time-period over time-period comparison of the status variable selected in the search criteria.

For example, if Q4 (2006 vs. 2005) is selected in the search criteria, the first bar for each entity plotted would include data covering the period from 10/1/07-12/31/06, and the second bar would cover the period 1/1/06-12/31/05.

- The first ten entities, based on $ volume for the most recent time period, are plotted. Add or remove entities from the chart by clicking on the corresponding row in the grid.
- Right-click functionality provides additional information:
  - Office Detail - specific office information.
  - Office Listings – audit trail to the records.
- Four views are available:
  - Change in $ Volume
  - Change in Percent Market Share - $ Volume
  - Change in # Units
  - Change in Percent Market Share - # Units

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Grids



Name	% Δ	QTD 2007-QTD 2006 $	QTD 2007 $	QTD 2006 $	DOM % Δ	DOM Change	QTD 2
Coldwell Banker B of V-Napa	-60.37	-89,615,950	58,832,050	148,448,000	55.36	31	
Coldwell Banker - Santa Rosa	-62.27	-87,836,624	53,210,973	141,047,597	36.54	19	
RE/MAX Napa Valley	-49.01	-39,431,700	41,017,500	80,449,200	3.85	2	
Sothebys International Realty	15.05	5,050,650	38,604,400	33,553,750	18.37	9	
Creative Property Services	-65.59	-69,957,040	36,696,260	106,653,300	65.00	26	
Century 21 Alliance	-60.15	-54,216,930	35,919,875	90,136,805	11.54	6	
Frank Howard Allen-Santa Rosa	-66.27	-62,112,498	31,613,525	93,726,023	40.38	21	
Prudential California Realty	-55.58	-38,421,836	30,705,880	69,127,716	35.59	21	
Non-member Office	-12.70	-4,118,975	28,322,950	32,441,925	44.64	25	
Creative Property Services	-61.74	-41,254,499	25,565,150	66,819,649	47.62	20	
Coldwell Banker Deanza	-61.84	-40,976,442	25,285,600	66,262,042	-27.27	-18	
Pacific Union GMAC Real Estate	-26.03	-8,079,258	22,964,200	31,043,458	34.33	23	
RE/MAX Central Santa Rosa	-63.53	-28,635,125	16,441,100	45,076,225	11.76	6	
Harry & Sheree Fogel Fine Prop	68.35	5,881,000	14,485,000	8,604,000	175.68	65	
Frank Howard Allen-Sonoma	-79.87	-57,001,425	14,363,000	71,364,425	42.86	21	
McBride Realty	-45.56	-11,715,750	13,997,500	25,713,250	-27.03	-20	
Pacific Union-Coralee Barkela	-39.39	-8,322,950	12,807,300	21,130,250	51.11	23	
Windermere Wine Country Prop.	-53.55	-13,576,205	11,775,355	25,351,560	169.23	66	
Pacific Union GMAC Real Estate	-63.74	-19,739,950	11,229,700	30,969,650	61.76	42	
Morgan Lane	98.85	5,474,000	11,011,500	5,537,500	-56.14	-64	
Century 21 Wine Country	-70.45	-26,124,850	10,960,500	37,085,350	30.00	15	
Coldwell Banker-Sebastopol	-67.09	-21,797,352	10,694,000	32,491,352	21.95	9	
Morgan Lane Inc, Napa	-73.99	-29,755,500	10,461,400	40,216,900	42.65	29	
CPS/Property Advocates	-52.88	-11,733,454	10,457,000	22,190,454	-1.89	-1	
Hurd Real Estate	-73.22	-25,113,262	9,184,438	34,297,700	7.14	5	
Morgan Lane	-60.47	-12,268,000	8,021,000	20,289,000	-18.48	-17	
RE/MAX North Bay Realty	-68.76	-17,645,050	8,018,000	25,663,050	31.25	10	
Prudential California Realty	-71.19	-17,962,380	7,269,720	25,232,100	-5.66	-3	
RE/MAX Napa Valley	-53.48	-8,302,350	7,221,400	15,523,750	241.67	58	
	-60.80	-1,494,943,797	963,897,952	2,458,841,749	33.33	17	

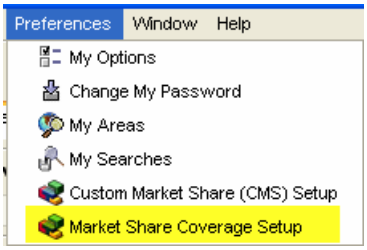
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable to any database program (e.g. Excel) if desired
- Office Breakdown (Broker and Custom Market Share searches) – provides a list of the offices included in each group.
- Use the Grid Controls to show or conceal highlighted rows and address columns
- Office Detail – specific office information
- Office Listings – audit trail down to the individual records

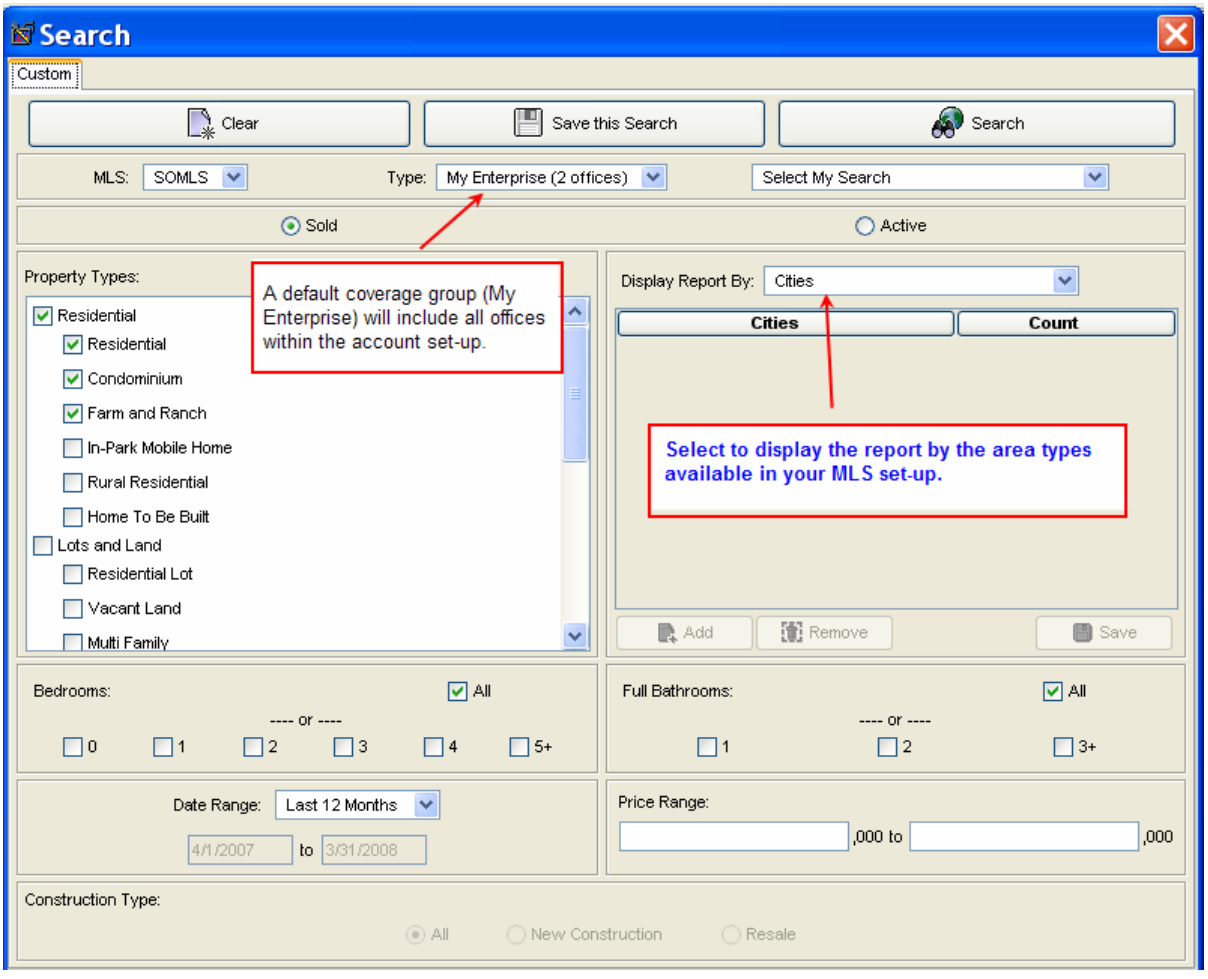
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Market Share Coverage

Provides a tool that allows the broker and/or office manager to determine the office's most active market areas for any particular property type (or combination of property types).

- A default coverage group (My Enterprise) will include all offices within account set-up.
- Additional coverage groups can be created in the Preferences menu.
- The report data is will display based on the area type selected.



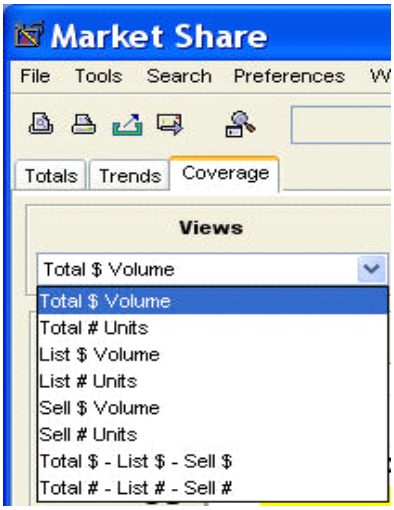


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Search Results

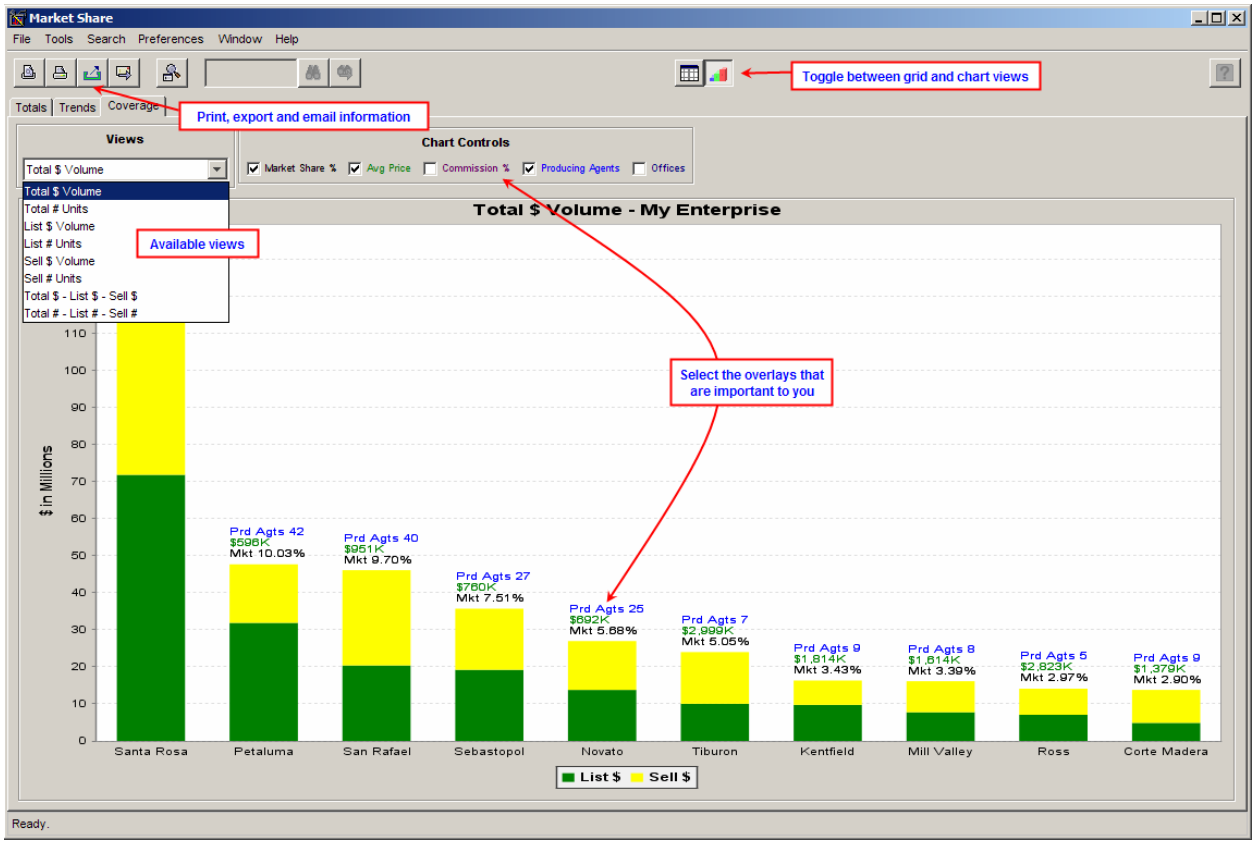
Displayed in two forms: chart and grid. Toggle between them using the chart and grid buttons.

- Chart form is the default display, grid form is accessed via the toggle button.
- Print and email functionality is available.
- Multiple report formats are available, including:
  - $ Volume and # Units for List-side only and Sell-side only.
  - List Side demonstrates your success in obtaining the highest prices relative to the original listing price for your sellers (List Side).



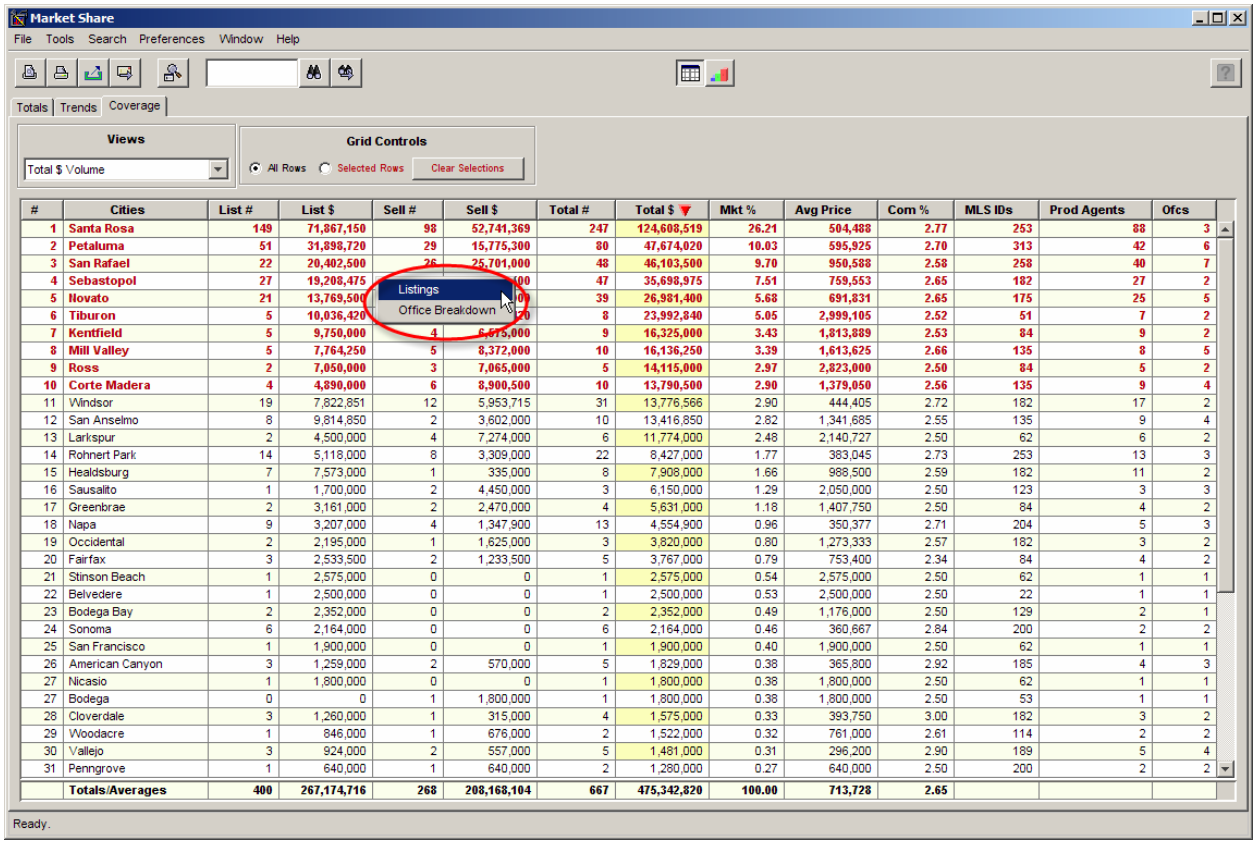
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Chart



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Grid



#	Cities	List #	List $	Sell #	Sell $	Total #	Total $	Mkt %	Avg Price	Com %	MLS IDs	Prod Agents	Ofcs
1	Santa Rosa	149	71,867,150	98	52,741,369	247	124,608,519	26.21	504,488	2.77	253	88	3
2	Petaluma	51	31,898,720	29	15,775,300	80	47,674,020	10.03	595,925	2.70	313	42	6
3	San Rafael	22	20,402,500	26	25,701,000	48	46,103,500	9.70	950,588	2.58	258	40	7
4	Sebastopol	27	19,208,475	20	[illegible]	47	35,698,975	7.51	759,553	2.65	182	27	2
5	Novato	21	13,769,500	18	[illegible]	39	26,981,400	5.68	691,831	2.65	175	25	5
6	Tiburon	5	10,036,420	3	[illegible]	8	23,992,840	5.05	2,999,105	2.52	51	7	2
7	Kentfield	5	9,750,000	4	[illegible]	9	16,325,000	3.43	1,813,889	2.53	84	9	2
8	Mill Valley	5	7,764,250	5	8,372,000	10	16,136,250	3.39	1,613,625	2.66	135	8	5
9	Ross	2	7,050,000	3	7,065,000	5	14,115,000	2.97	2,823,000	2.50	84	5	2
10	Corte Madera	4	4,890,000	6	8,900,500	10	13,790,500	2.90	1,379,050	2.56	135	9	4
11	Windsor	19	7,822,851	12	5,953,715	31	13,776,566	2.90	444,405	2.72	182	17	2
12	San Anselmo	8	9,814,850	2	3,602,000	10	13,416,850	2.82	1,341,685	2.55	135	9	4
13	Larkspur	2	4,500,000	4	7,274,000	6	11,774,000	2.48	2,140,727	2.50	62	6	2
14	Rohnert Park	14	5,118,000	8	3,309,000	22	8,427,000	1.77	383,045	2.73	253	13	3
15	Healdsburg	7	7,573,000	1	335,000	8	7,908,000	1.66	988,500	2.59	182	11	2
16	Sausalito	1	1,700,000	2	4,450,000	3	6,150,000	1.29	2,050,000	2.50	123	3	3
17	Greenbrae	2	3,161,000	2	2,470,000	4	5,631,000	1.18	1,407,750	2.50	84	4	2
18	Napa	9	3,207,000	4	1,347,900	13	4,554,900	0.96	350,377	2.71	204	5	3
19	Occidental	2	2,195,000	1	1,625,000	3	3,820,000	0.80	1,273,333	2.57	182	3	2
20	Fairfax	3	2,533,500	2	1,233,500	5	3,767,000	0.79	753,400	2.34	84	4	2
21	Stinson Beach	1	2,575,000	0	0	1	2,575,000	0.54	2,575,000	2.50	62	1	1
22	Belvedere	1	2,500,000	0	0	1	2,500,000	0.53	2,500,000	2.50	22	1	1
23	Bodega Bay	2	2,352,000	0	0	2	2,352,000	0.49	1,176,000	2.50	129	2	1
24	Sonoma	6	2,164,000	0	0	6	2,164,000	0.46	360,667	2.84	200	2	2
25	San Francisco	1	1,900,000	0	0	1	1,900,000	0.40	1,900,000	2.50	62	1	1
26	American Canyon	3	1,259,000	2	570,000	5	1,829,000	0.38	365,800	2.92	185	4	3
27	Nicasio	1	1,800,000	0	0	1	1,800,000	0.38	1,800,000	2.50	62	1	1
27	Bodega	0	0	1	1,800,000	1	1,800,000	0.38	1,800,000	2.50	53	1	1
28	Cloverdale	3	1,260,000	1	315,000	4	1,575,000	0.33	393,750	3.00	182	3	2
29	Woodacre	1	846,000	1	676,000	2	1,522,000	0.32	761,000	2.61	114	2	2
30	Vallejo	3	924,000	2	557,000	5	1,481,000	0.31	296,200	2.90	189	5	4
31	Penngrove	1	640,000	1	640,000	2	1,280,000	0.27	640,000	2.50	200	2	2
	Totals/Averages	**400**	**267,174,716**	**268**	**208,168,104**	**667**	**475,342,820**	**100.00**	**713,728**	**2.65**			

- Top 10 regions are selected (bold red text) by default for convenience.
- The rows that are selected (by default or via mouse click) will be charted – chart esthetics will help you determine the appropriate limit.
- Use the Grid Controls to show or conceal highlighted rows.
- Underlying record information is accessed and displayed via the BrokerMetrics® right mouse click function and is exportable as a csv file for use in any database program (e.g. Excel) if desired.

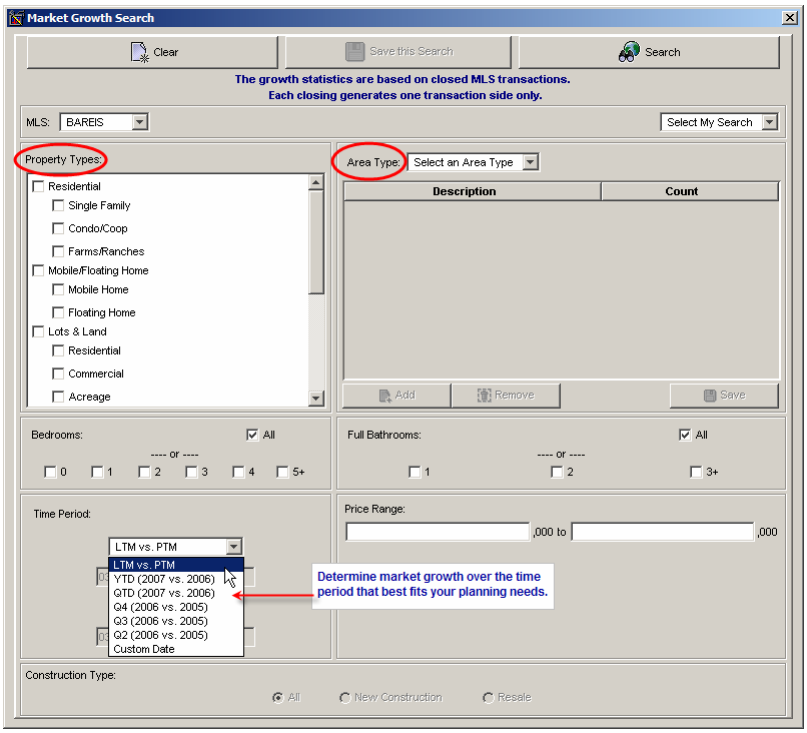
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Market Growth

Allows you to determine the rate of market growth in various geographical areas (counties, cities and ZIP codes). You can then compare your office(s) performance against these general market conditions. In addition, you can export the underlying data for use with off-the-shelf GIS mapping software (such as Microsoft's MapPoint) to create maps that "visually" identify areas of opportunity in *your* market.

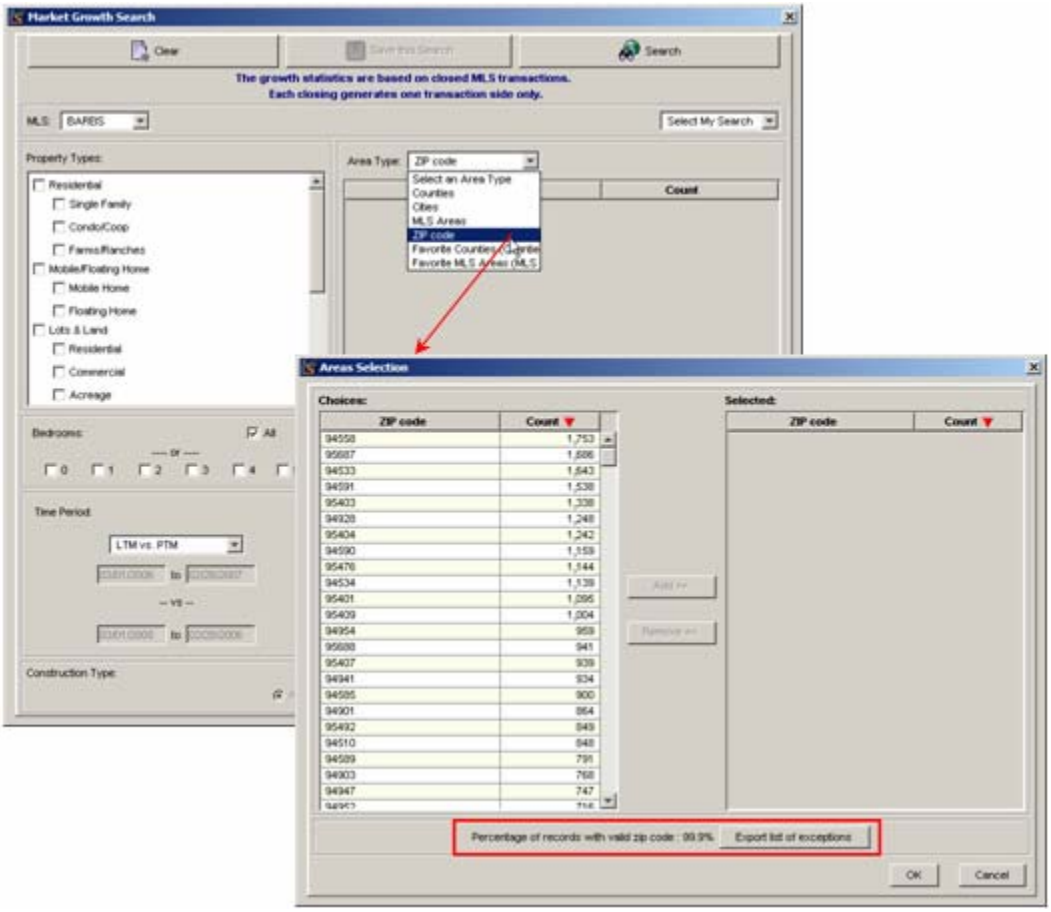
Market Growth Search Screen

- Click on the property type(s) desired.
- Select from the picklist the geographical grouping you would like for aggregation and mapping purposes.
- Select the appropriate timeframe.
- Select additional criteria if desired.



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

- Only records of Sold properties with valid counties, cities or zip codes will be returned in the search, so only valid cities, counties or zip codes will appear in the Choices pane on the Add Areas window.
- Export a csv file of listings with invalid counties, cities or zip codes so you can follow up with the appropriate people for corrections.

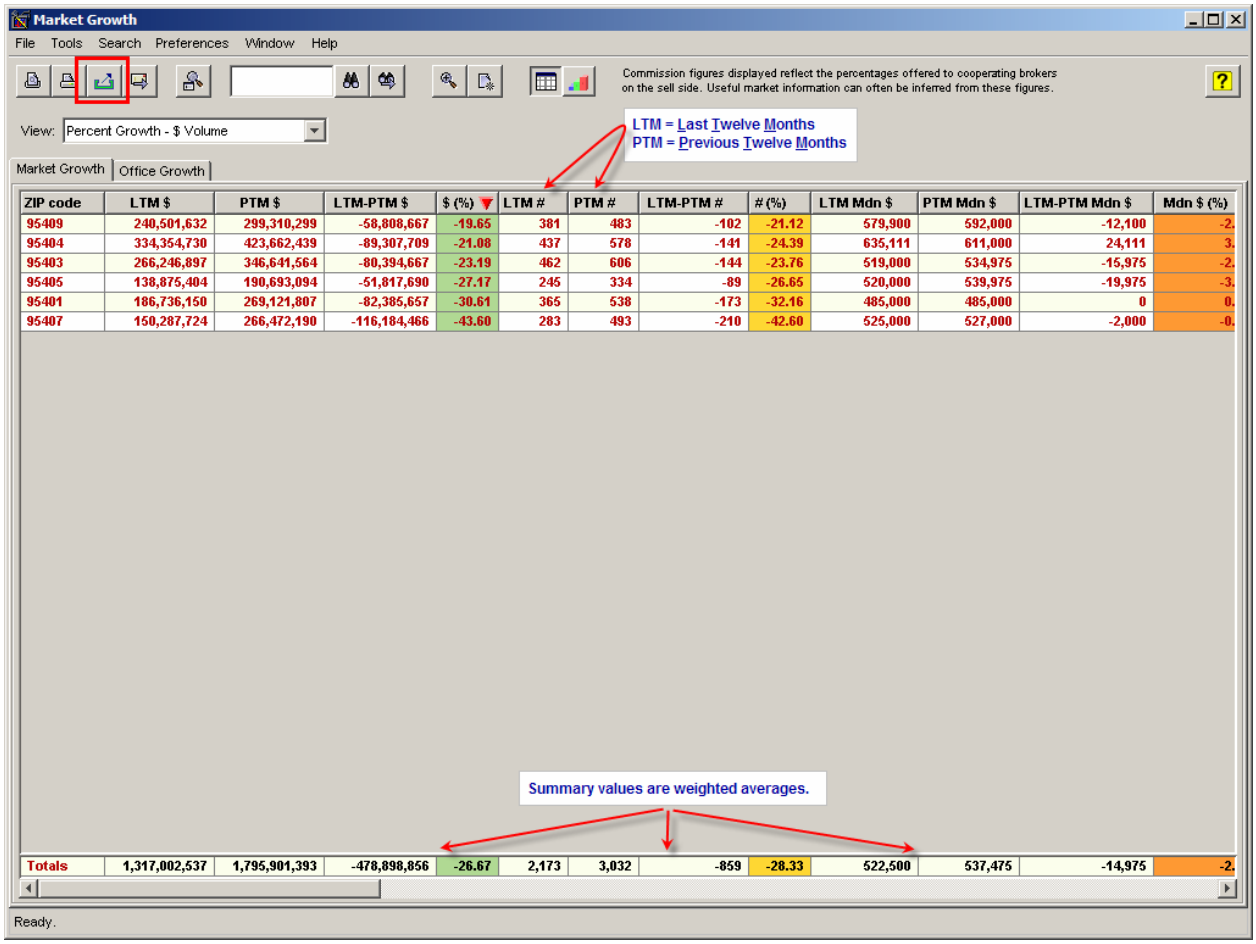


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Market Growth

Compares the sales volume (number of units sold and dollar volume) in the selected areas over two time periods and then calculates the growth (or decline) between those periods.

- The underlying information has been formatted for GIS export, i.e. listings with invalid zip codes or cities (due to misspellings, non-standard abbreviations, etc.) will **not** be included in the data set or calculations.
- Information displayed is list-side only because it is growth, not market share, that is being measured.
- The MLS commission information is based on the percentage that is offered to the cooperating broker (sell side) by the listing agent/office.
- Horizontal scrollbar at the bottom of the screen allows you to view hidden columns.

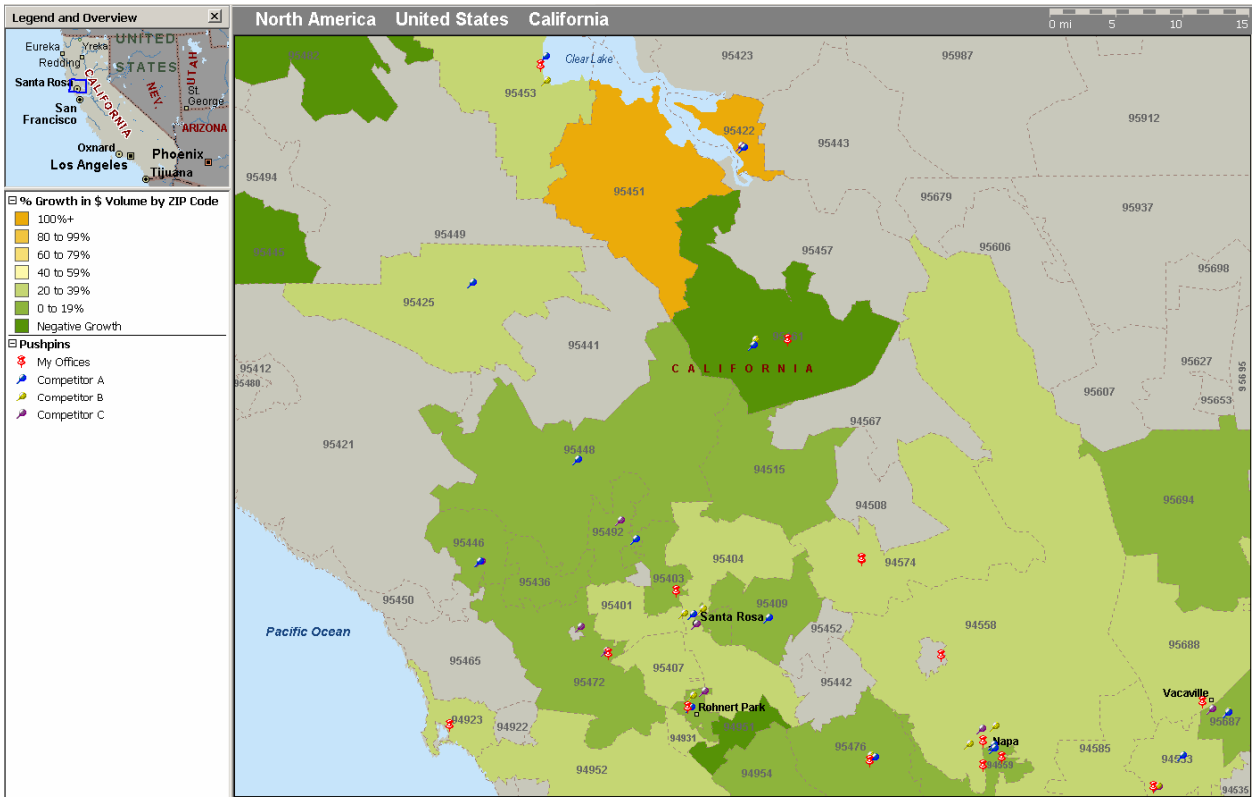


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Export

Export the information to a csv file for use with a geographic information system (GIS) such as MapPoint.

- Data is aggregated by the area type specified in the search criteria.
- See areas of high and negative growth, as well as areas that have remained static.
- Overlay office locations (see Office Location, pg. 73) as pushpins to get a complete picture of how your offices are situated relative to prevailing market conditions.
- Compare any office's performance relative to these market conditions. Visually determine if there are any expansion opportunities available.

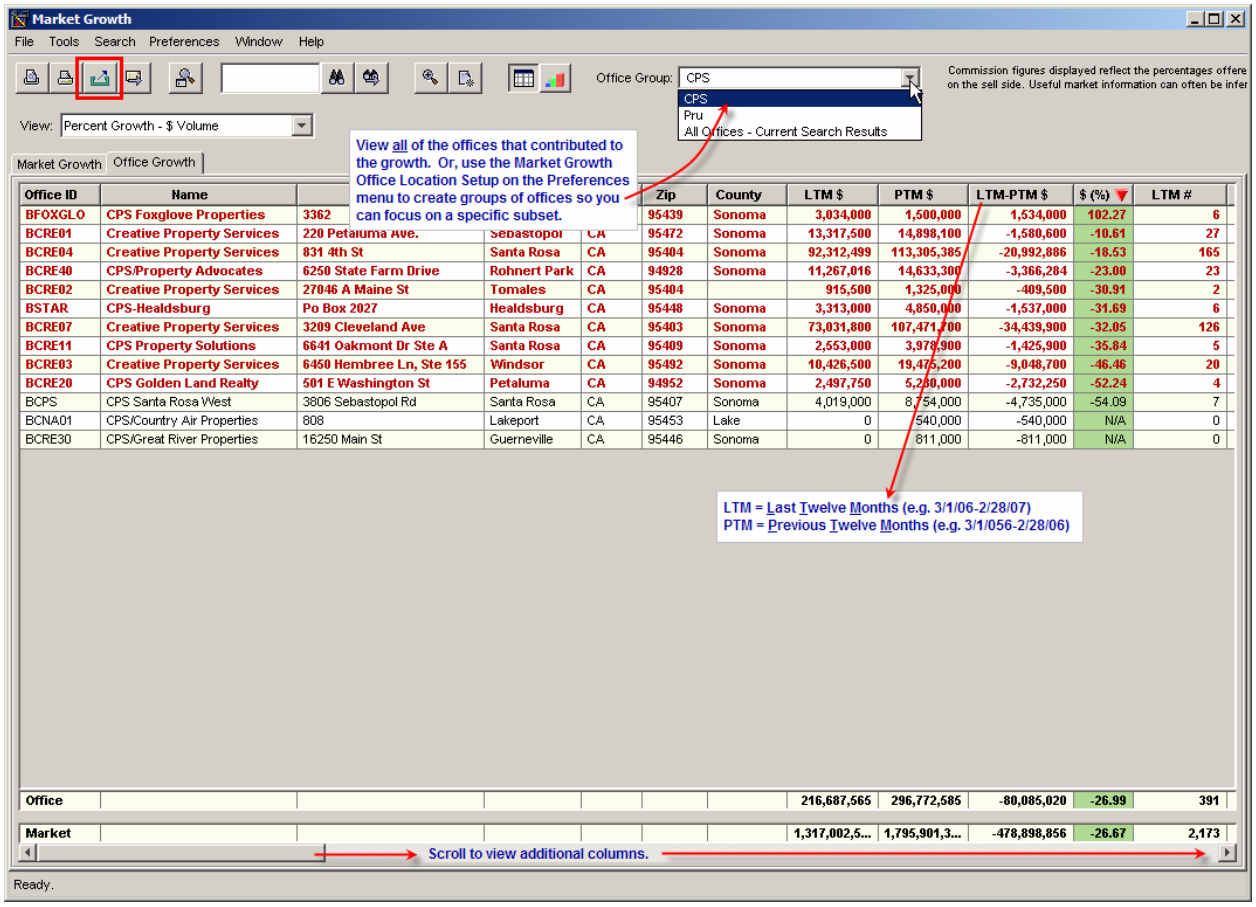


©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Office Growth

Compares the sales volume (number of units sold and dollar volume) for the offices in the selected areas over two time periods and then calculates the growth (or decline) between those periods.

- The underlying information has been formatted for GIS export, i.e. listings with invalid zip codes or cities (due to misspellings, non-standard abbreviations, etc.) will not be included in the data set or calculations.
- Information displayed is list-side only because it is growth, not market share, that is being measured.
- Commission information is based on the percentage that is offered to the cooperating broker (sell side) by the listing agent/office.
- Horizontal scrollbar at the bottom of the screen allows you to view hidden columns.


Market Growth
File Tools Search Preferences Window Help
Office Group: CPS
CPS
Pru
All Offices - Current Search Results
Commission figures displayed reflect the percentages offere
on the sell side. Useful market information can often be infer
View: Percent Growth - $ Volume
Market Growth
Office Growth
View all of the offices that contributed to the growth. Or, use the Market Growth Office Location Setup on the Preferences menu to create groups of offices so you can focus on a specific subset.
LTM = Last Twelve Months (e.g. 3/1/06-2/28/07)
PTM = Previous Twelve Months (e.g. 3/1/056-2/28/06)
Scroll to view additional columns.
Ready.

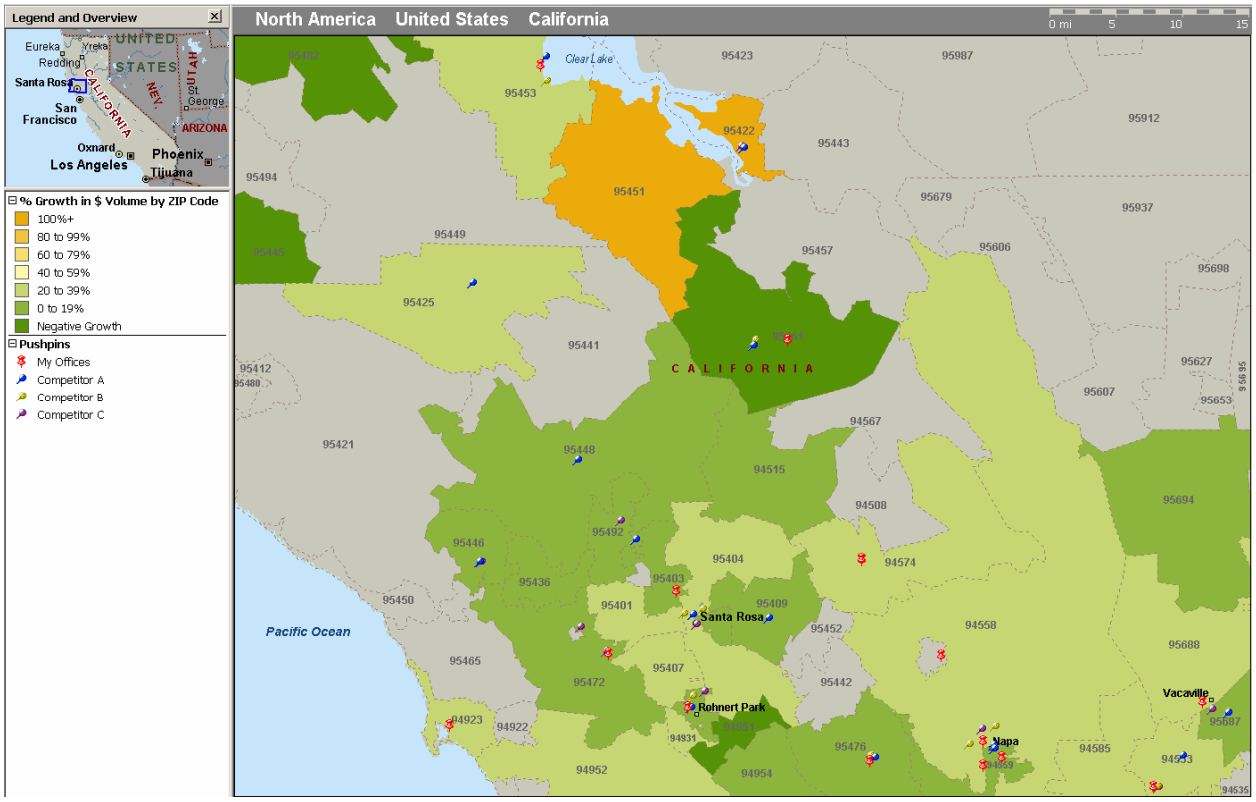
Office ID	Name				Zip	County	LTM $	PTM $	LTM-PTM $	$ (%)	LTM #
BFOXGLO	CPS Foxglove Properties	3362			95439	Sonoma	3,034,000	1,500,000	1,534,000	102.27	6
BCRE01	Creative Property Services	220 Petaluma Ave.	Sebastopol	CA	95472	Sonoma	13,317,500	14,898,100	-1,580,600	-10.61	27
BCRE04	Creative Property Services	831 4th St	Santa Rosa	CA	95404	Sonoma	92,312,499	113,305,385	-20,992,886	-18.53	165
BCRE40	CPS/Property Advocates	6250 State Farm Drive	Rohnert Park	CA	94928	Sonoma	11,267,016	14,633,300	-3,366,284	-23.00	23
BCRE02	Creative Property Services	27046 A Maine St	Tomales	CA	95404		915,500	1,325,000	-409,500	-30.91	2
BSTAR	CPS-Healdsburg	Po Box 2027	Healdsburg	CA	95448	Sonoma	3,313,000	4,850,000	-1,537,000	-31.69	6
BCRE07	Creative Property Services	3209 Cleveland Ave	Santa Rosa	CA	95403	Sonoma	73,031,800	107,471,700	-34,439,900	-32.05	126
BCRE11	CPS Property Solutions	6641 Oakmont Dr Ste A	Santa Rosa	CA	95409	Sonoma	2,553,000	3,978,900	-1,425,900	-35.84	5
BCRE03	Creative Property Services	6450 Hembree Ln, Ste 155	Windsor	CA	95492	Sonoma	10,426,500	19,475,200	-9,048,700	-46.46	20
BCRE20	CPS Golden Land Realty	501 E Washington St	Petaluma	CA	94952	Sonoma	2,497,750	5,230,000	-2,732,250	-52.24	4
BCPS	CPS Santa Rosa West	3806 Sebastopol Rd	Santa Rosa	CA	95407	Sonoma	4,019,000	8,754,000	-4,735,000	-54.09	7
BCNA01	CPS/Country Air Properties	808	Lakeport	CA	95453	Lake	0	540,000	-540,000	N/A	0
BCRE30	CPS/Great River Properties	16250 Main St	Guerneville	CA	95446	Sonoma	0	811,000	-811,000	N/A	0
Office							216,687,565	296,772,585	-80,085,020	-26.99	391
Market							1,317,002,5...	1,795,901,3...	-478,898,856	-26.67	2,173

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Export

Export the information to a csv file for use with a geographic information system such as MapPoint.

- Overlay office locations (see Office Location, pg. 73) as pushpins to get a complete picture of how your offices are situated relative to prevailing market conditions.
- Compare any office's performance relative to these market conditions.
- Visually determine if there are any expansion opportunities available.



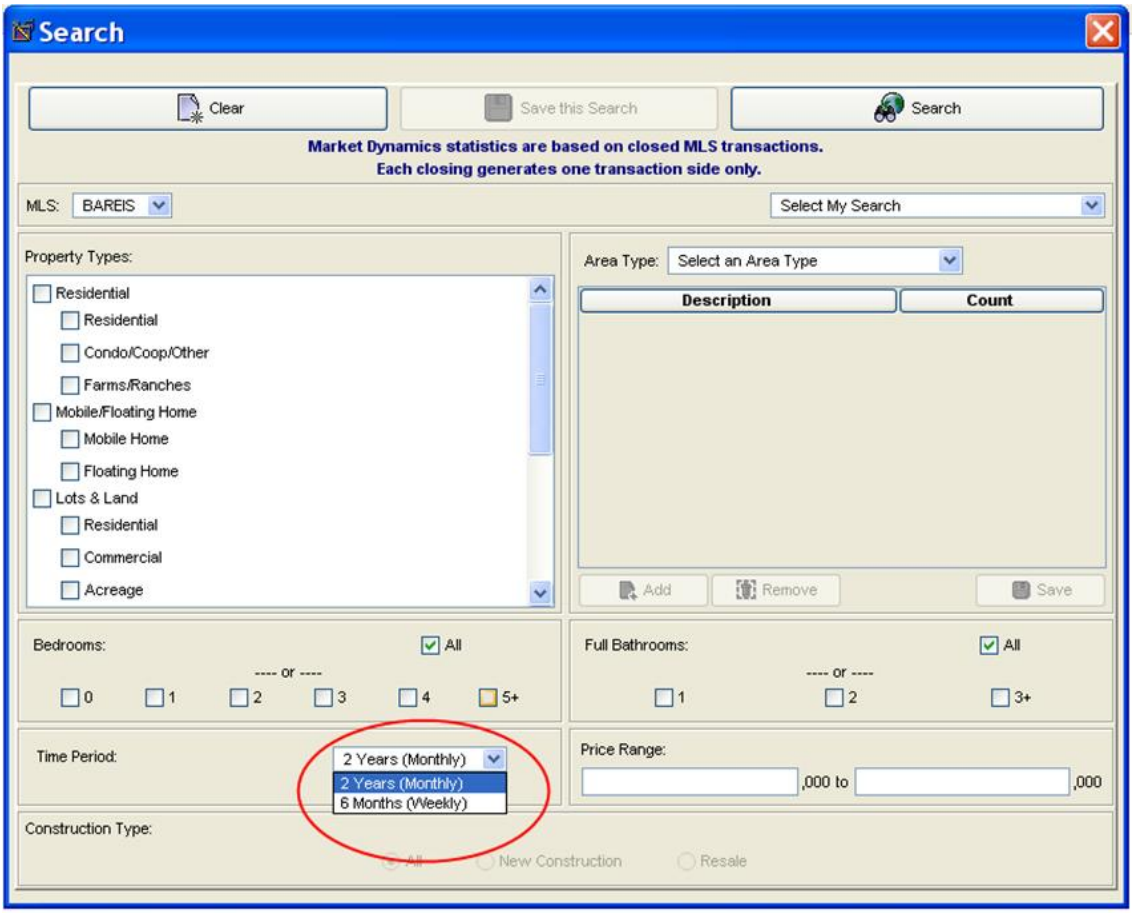
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Market Dynamics

Allows you to better understand the movement of various market variables over time, from both a macro and micro perspective. For instance, you can view the median price trending for SFD homes over the whole MLS or for a very specific type, e.g. 4 BD homes in Plano.

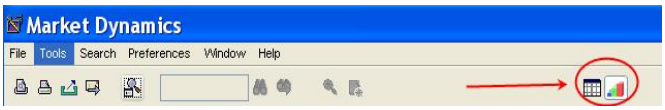
Search Screen

- Property types and area types mirror your MLS system.
- Bedroom and bathroom criteria are available.
- Any price range can be used.
- Time period can cover either 2 Years (Monthly) or 6 Months (Weekly)



Search Results

- This tool measures changes to market conditions over 2 Years (Monthly) and 6 Months (Weekly).



- Each view consists of a chart page and a corresponding grid. Toggle between them using the chart and grid buttons
- The views are presented on 3 tabs: Price, Supply & Demand, and Sales Rate.
- Each chart page is comprised of 3 general areas: Chart Controls, Chart, and Key Information.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Chart Page

Chart Controls

Depending on the information displayed and time period selected in the search, some or all of the following features are available on each view:

Additional Data

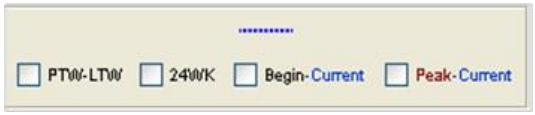
Each chart has a default view which plots the primary data set. Certain charts allow you to add supplementary data sets by selecting the checkboxes.

Information Overlays

Display certain values over the chart bars. The feature is available when one data set is plotted; it is inactive when supplementary data sets are added to the charts.

Demarcation Lines

These lines are placed across the width of the chart to depict monthly averages, and/or the values for the beginning and ending months. The feature is available when one data set is plotted; it is inactive when supplementary data sets are added to the charts.

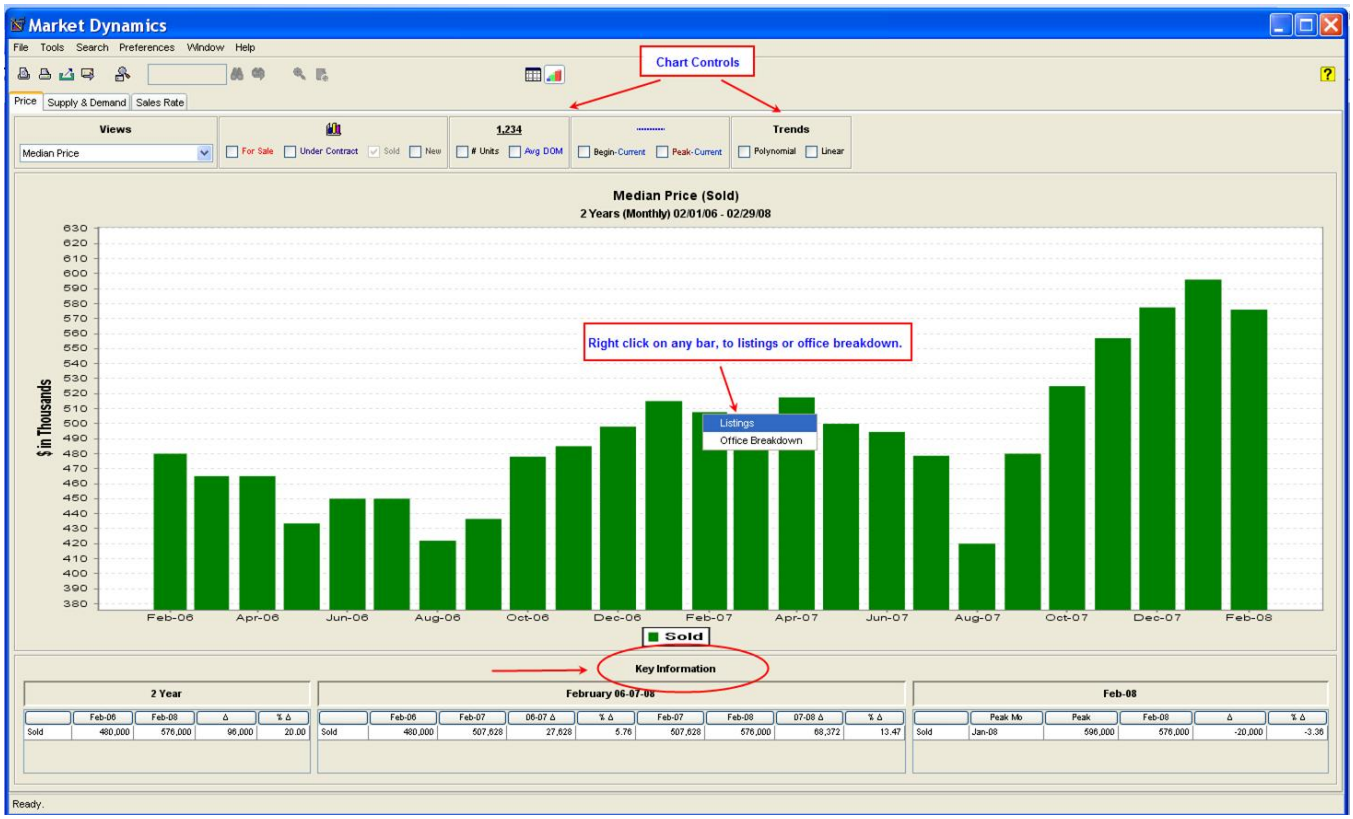


Trend Lines

Straight or polynomial (curved) trend lines are available for all views. The feature is available when any number of data sets are plotted; one line will be displayed for each data set.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Chart



Each chart is designed to convey certain specific information. You may customize the primary views by utilizing the chart controls described above. The Key Information grids below the charts, described below, help you interpret the data and provide important related information.

Office and listing information is available by right-clicking on a bar or data point on the chart.

- Click on **Listings** to view and/or export all listings for the month or week, depending on search criteria. There are separate tabs for each status based on the statuses selected in the chart control panel above the graph.

- Click on **Office Breakdown** for a list of the offices that are involved in the data calculations for that specific month or week. Right-click on a row in the Office Breakdown for Office Detail or Listing Detail.
    - **Office Detail** provides addresses and contact information for the office.
    - **Office Listings** displays the listings for that office. There are separate tabs for each status based on the statuses selected in the chart control panel above the graph. Right-click on a row in Listing Detail for the specifics of that listing.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Key Information

The area below the charts is divided into three sections for both 2 Year (Monthly) and 6 Months (Weekly) time periods

2 Year (Monthly) Information

2 Year

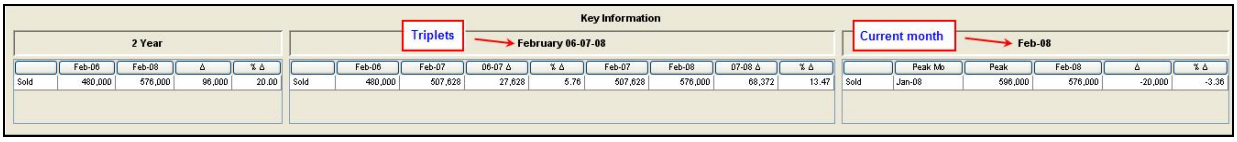
Focuses on the change in various market metrics over the entire (25-month) time period.

"Triplets"

Monitors the changes between the same calendar month over the last three years (e.g. Mar 05 – Mar 06 – Mar 07). Seasonal variation is thus isolated from this view, so that the focus remains strictly on the underlying market changes that have occurred year over year.

Current Month

Provides information on how the current month has changed from either the year before or the peak month of the entire time period (25 months).



6 Months (Weekly) Information

Last 24 Weeks

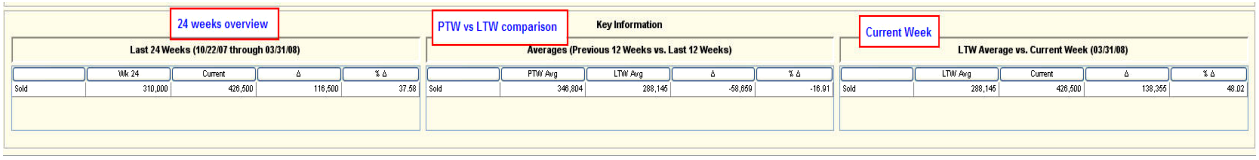
Focuses on the change in various market metrics for the entire 24 week time period.

PTW (Previous Twelve Weeks) vs LTW (Last Twelve Weeks)

Compares the averages of what is being measured over the last two 12-week periods. PTW represents the average for weeks 13 through 24 and LTW represents the average for weeks 1 through 12 (week 1 is the most recent week).

Current Week

Show the averages on how the current week has changed compared to the LTW averages.


24 weeks overview
PTW vs LTW comparison
Key Information
Current Week
Last 24 Weeks (10/22/07 through 03/31/08)
Averages (Previous 12 Weeks vs. Last 12 Weeks)
LTW Average vs. Current Week (03/31/08)

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Grid Page

The grid page displays the data by month or week. The grid columns are color-coded to the statuses plotted on the corresponding chart.

Office and listing information is available by right-clicking on a row on the grid. Click on **Office Breakdown** for a list of the offices that are involved in the data calculations for that specific month or week. Right-click on a row in the Office Breakdown for Office Detail or Listing Detail. Click on **Listings** to view the listings that were calculated for that specifice month or week.

Office Detail provides addresses and contact information for the office.
Office Listings displays the listings for that office. There are separate tabs for each status available for plotting on the corresponding chart. Right-click on a row in Listing Detail for the specifics of that listing.

Tabs

Price

This tab displays information depicting the movement of average and median prices based on the time period selected in the search criteria.

Supply & Demand

This tab portrays the relationships between the numbers of listings in each status category based on the time period selected in the search criteria.

Sales Rate

This tab illustrates the sales activity pace over the 25 months or 24 weeks. Two methods of calculating MSI (Months Supply of Inventory) are available:

NAR MSI
The number of properties For Sale on the last day of the month (FS#) divided by the number of properties that went Under Contract (UC#) during the month:

NAR MSI = FS# ÷ UC#

MSI
Terradatum's MSI calculation equals the number of properties For Sale (FS) during the month (that is, the property was Active at least one day during the month) minus the number of properties that went Under Contract (UC) during the month minus the number of properties that Expired (X) during the month, divided by the number or properties that went Under Contract (UC) during the month:

TD MSI = (FS – UC – X) ÷ UC

Basic Absorption
This chart monitors the amount of inventory versus the overall sales rate:

Inventory is broken down into two components:
New – Listing has an initial list date that falls during the month in question
Residual – The initial list date occurred prior to the month in question

Therefore, New Inventory is "freshly minted" for the month, and Residual Inventory includes listings that are being carried forward from earlier months.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Pricing Analysis

This tool provides real-time statistical information on the distribution of prices for a given set of property criteria over the last 12 months. The number of properties that were available for sale is compared with the number that sold and the number that are currently available.

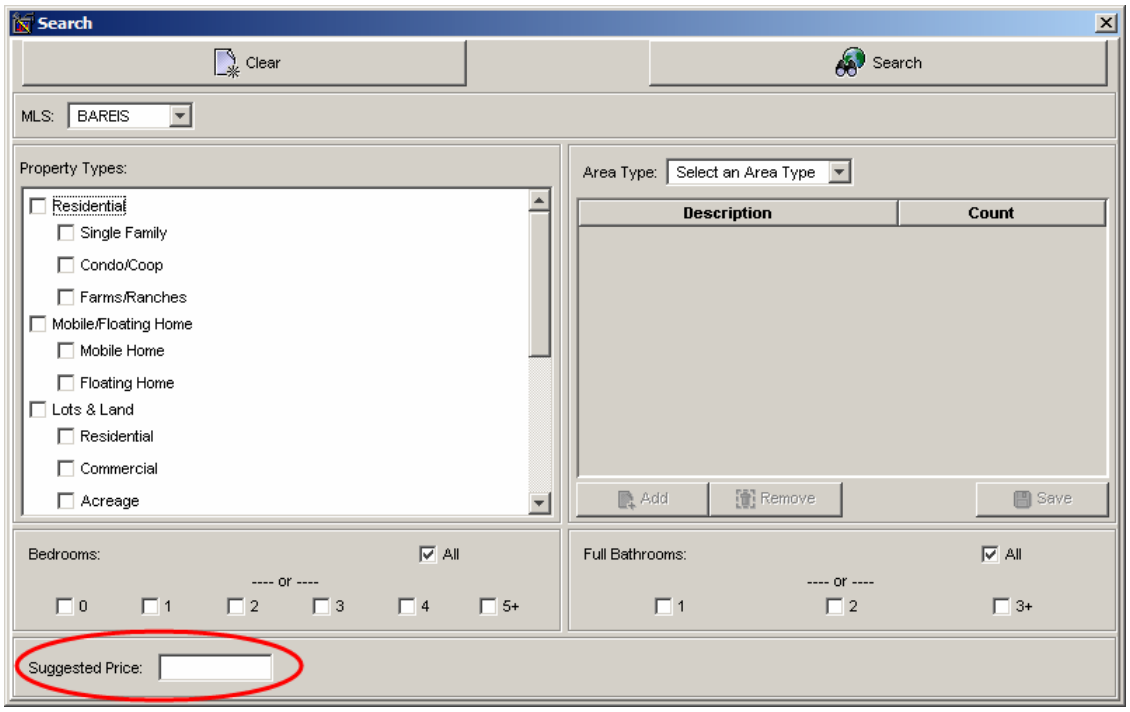
Managers will use this tool to double-check agents' pricing skills; agents will use it as an aid to pricing listings correctly.

The information being relayed, within any given price segment, is this:

- The number of properties that were listed (Listed #) is a pure measure of the market size.
- The number of properties that actually sold (Sold #) compared with the number that were listed is a measure of market strength, i.e. as the percentage of sold to listed gets higher the market gets stronger.
- The amount of current inventory supply indicates the market sales-potential, i.e. whether the market has reasonable size and strength. A small inventory supply indicates that a well priced property would sell quickly; a large supply indicates a longer sales cycle.

Pricing Analysis Search Screen

- Property types and area types mirror your MLS system.
- Bedroom and bathroom criteria are available.
- Any price range can be used.
- Suggested Price: Enter the suggested price in the text box provided. This input is not required; however, entering a suggested price will help you focus the search results more precisely. If a Suggested Price is not entered, the Median Price of all properties meeting the search criteria will be used.



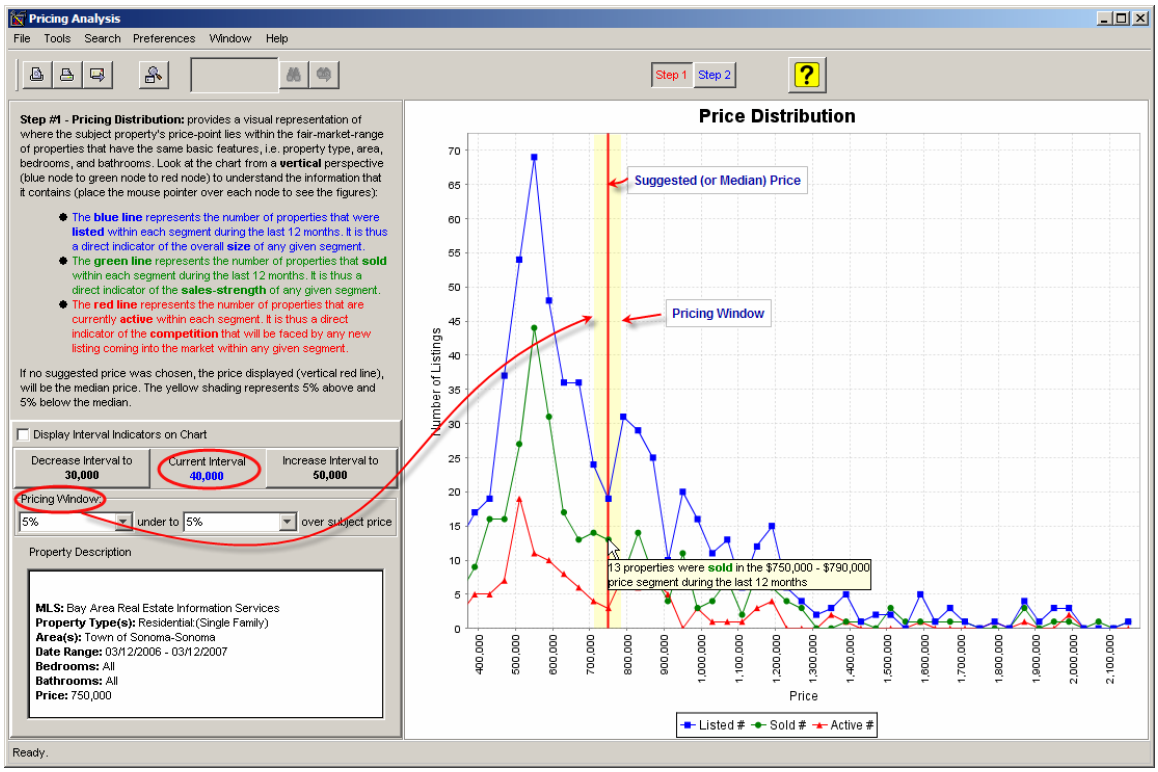
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Results

Analyzing the results of a Pricing Analysis search is a two-step process:

Step #1 – Price Distribution

The Price Distribution chart displays the last 12 months' price distributions, overlaid with current inventory. The suggested price of the subject property is indicated on the vertical red line, which shows how the property fits within the distribution curve. If a suggested price was not entered, the vertical red line will indicate the median price of all properties that meet the search criteria.

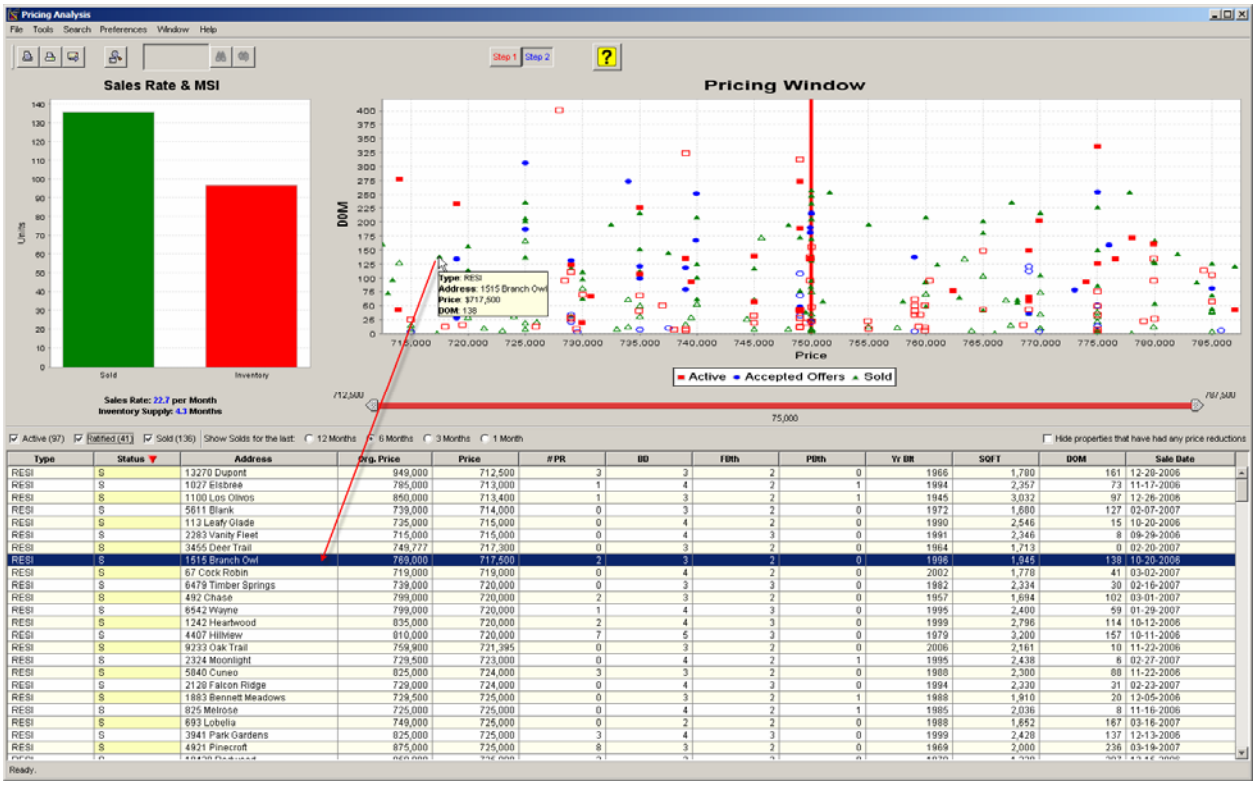

Pricing Analysis
File Tools Search Preferences Window Help
Step 1 Step 2
Step #1 - Pricing Distribution: provides a visual representation of where the subject property's price-point lies within the fair-market-range of properties that have the same basic features, i.e. property type, area, bedrooms, and bathrooms. Look at the chart from a vertical perspective (blue node to green node to red node) to understand the information that it contains (place the mouse pointer over each node to see the figures):
The blue line represents the number of properties that were listed within each segment during the last 12 months. It is thus a direct indicator of the overall size of any given segment.
The green line represents the number of properties that sold within each segment during the last 12 months. It is thus a direct indicator of the sales-strength of any given segment.
The red line represents the number of properties that are currently active within each segment. It is thus a direct indicator of the competition that will be faced by any new listing coming into the market within any given segment.
If no suggested price was chosen, the price displayed (vertical red line), will be the median price. The yellow shading represents 5% above and 5% below the median.
Display Interval Indicators on Chart
Decrease Interval to 30,000
Current Interval 40,000
Increase Interval to 50,000
Pricing Window:
5% under to 5% over subject price
Property Description
MLS: Bay Area Real Estate Information Services
Property Type(s): Residential:(Single Family)
Area(s): Town of Sonoma-Sonoma
Date Range: 03/12/2006 - 03/12/2007
Bedrooms: All
Bathrooms: All
Price: 750,000
Price Distribution
Suggested (or Median) Price
Pricing Window
Number of Listings
13 properties were sold in the $750,000 - $790,000 price segment during the last 12 months
Price
Listed # Sold # Active #
Ready.

- Use the Interval and Pricing window controls to fine-tune the appropriate price intervals (depicted as data points on the chart) and pricing window size. The default pricing window (the yellow band) is 5% under and 5% over the suggested price of the subject property.

- Hold the mouse pointer over a data point on the chart to display the pricing interval and the number of properties that were sold or listed during the last 12 months (green and blue lines, respectively) or are currently for sale (red line).

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Step #2 – Sales Rate, Months Supply of Inventory and Pricing Window



Sales Rate and MSI (Months Supply of Inventory)

This chart shows the monthly sales rate (the average number of units sold per month) and inventory supply (the number of months it would take to sell the properties currently on the market, based on the Sales Rate) for properties in the Pricing Zone (the market segment that includes the subject property).

Pricing Window

- The Pricing Window scatter graph displays the properties within the Pricing Zone relative to the subject property (the vertical red line).

- The DOM number is represented by the vertical height (loft) of each data point—e.g., the higher any data point, the longer it has been on the market.

Listings Grid

- The grid below the chart contains data on the specific properties in the Pricing Window. Click on a row to remove a property from the Pricing Window; click it again to restore it.

- Hold the mouse pointer over a data point on the chart to highlight the related row in the grid, and to display key information on the property (Property Type, Address, Price and DOM).

- Hollow symbols on the graph represent properties that have experienced no price reductions; solid symbols represent properties that have had at least one price reduction.

Fine-tuning

- Display Active, Ratified (Pending and Contingent), and/or Sold properties using the checkboxes above the grid. The chart initially displays only Sold properties.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

- Display properties sold within the last 12, 6 (default), or 3 months, or within the previous one month, by clicking the radio buttons above the grid. The Sales Rate and MSI will recalculate accordingly.
- Hide properties that have had one or more price reduction(s) by clicking the checkbox at the right above the grid.
- Use the red slider bar to tighten up the pricing window (place the mouse pointer on one end of the slider, click, hold, and move the slider).

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Performance Management

The ***Performance Management*** tool consists of two tabbed sections:

Measure Performance

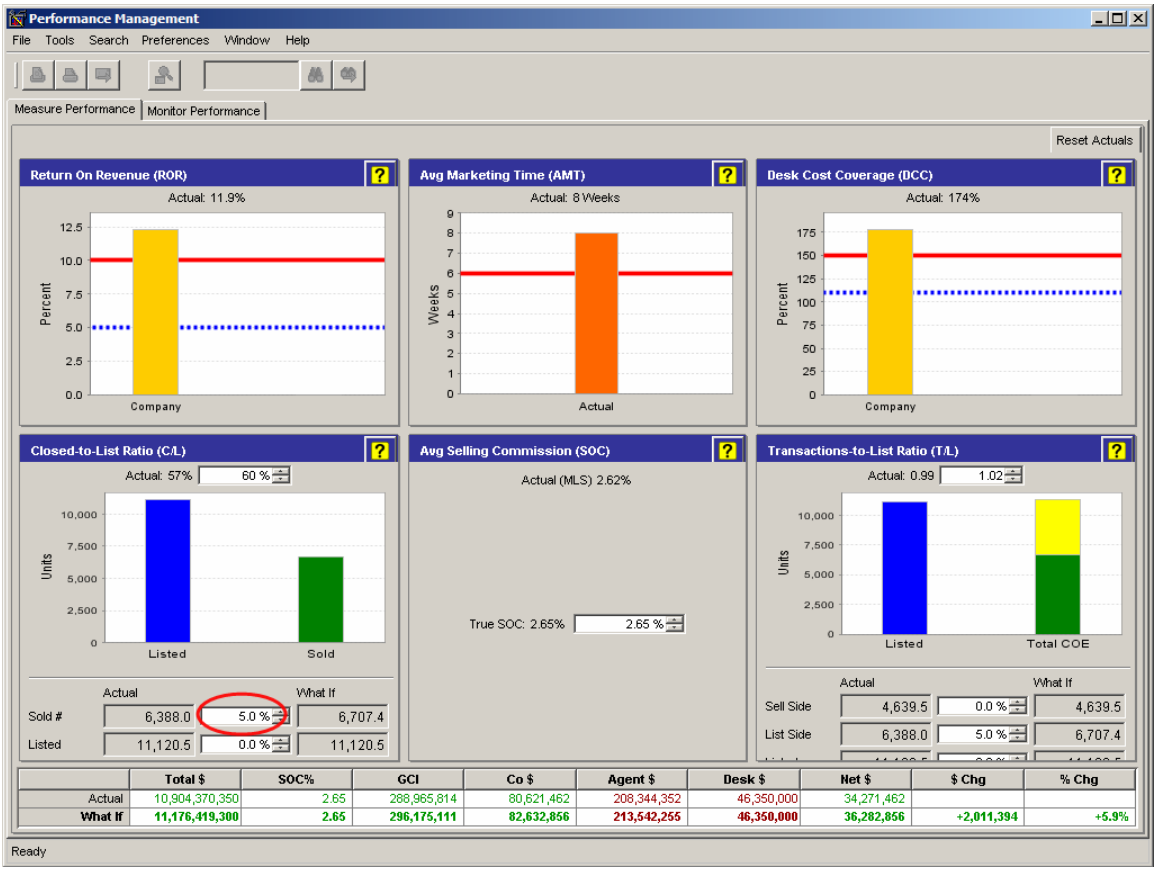
Monitor Performance

Measure Performance

Provides a snapshot view of how efficiently your enterprise is operating, and allows you to project the effects of incremental changes in key financial and transaction elements. As you make changes by operating the spinners up or down, the resulting changes will be reflected in the What If row at the bottom of the page.

The Actual/What If summary grid shows the effects of changing one or more variables. For example, increasing the **Sold #** by 5% in the Closed-to-List Ratio section increases the Total $, GCI, Agent $ and Co $, increasing the Net $ by 3.7%. Return on Revenue (ROR) and Desk Cost Coverage (DCC) are improved as well; display the new, "What-If" values for these metrics by holding the mouse pointer over the bar representing "Office" on the respective charts.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

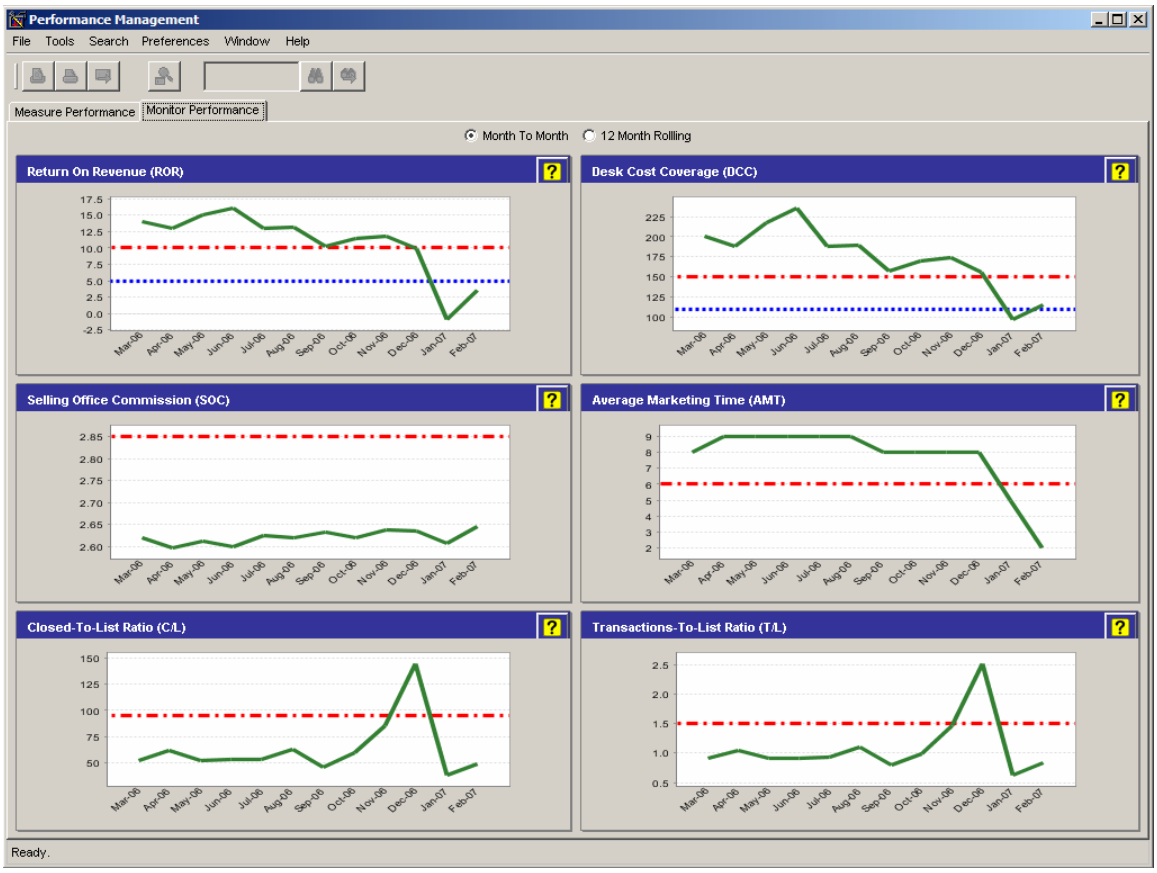


- To change the numbers: Click on the up or down arrows, or type a new number into the box and press **Enter**.
- To reset the variables back to the actual values, click the Reset Actuals button at the top right.

- The dotted blue line on the Return on Revenue and Desk Cost Coverage charts represents the minimum target, or acceptable, value for this metric.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Monitor Performance



Allows you to measure the performance of your enterprise against the goals you have established.

The dashed red lines represent the annual goals.

The dotted blue lines on ROR and DCC represent the minimum target (acceptable) values for these metrics.

Depending on the radio button that is selected above the charts, the green lines on each chart display either:

- Monthly totals for the previous twelve months ("Month To Month"), OR
- Annual totals for the previous twelve months ("12 Month Rolling").

For example, if the 12 Month Rolling radio button is selected (at the top of the chart), the data point for Feb-07 on the Average Marketing Time chart represents the average number of days on market for all properties during the period March 1, 2006 through February 28, 2007. If the Month To Month radio button is selected, the time period represented is February 1 through 28, 2007.

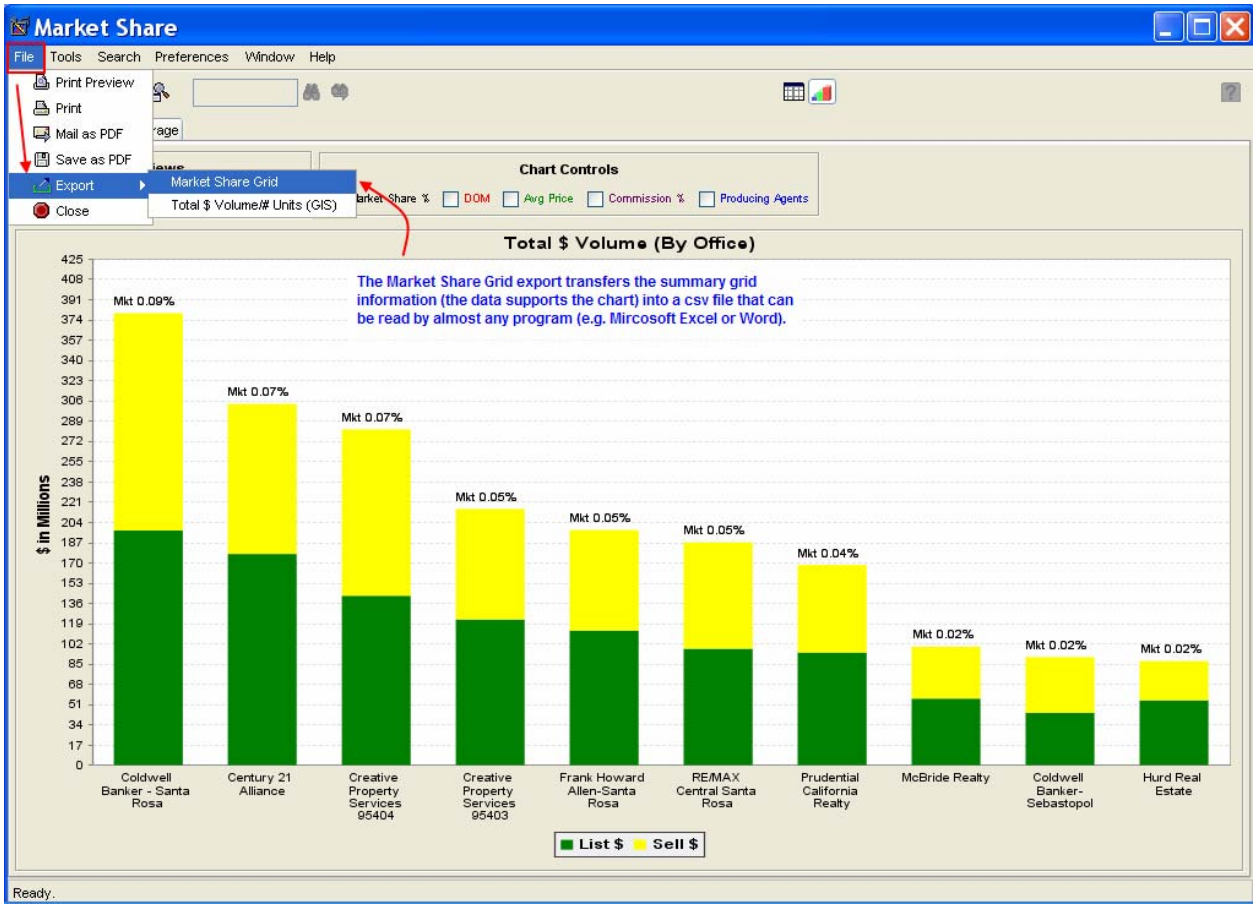
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

Exports

BrokerMetrics® allows you to export data from many places in the program into a file that can be read and manipulated by other programs (e.g., Microsoft Excel, Microsoft MapPoint, etc.). These exports allow the user to extend the scope and power of the aggregated information with functionality from other sources.

A few examples will illustrate how to use the various exports:

Market Share Totals – Market Share Grid Export



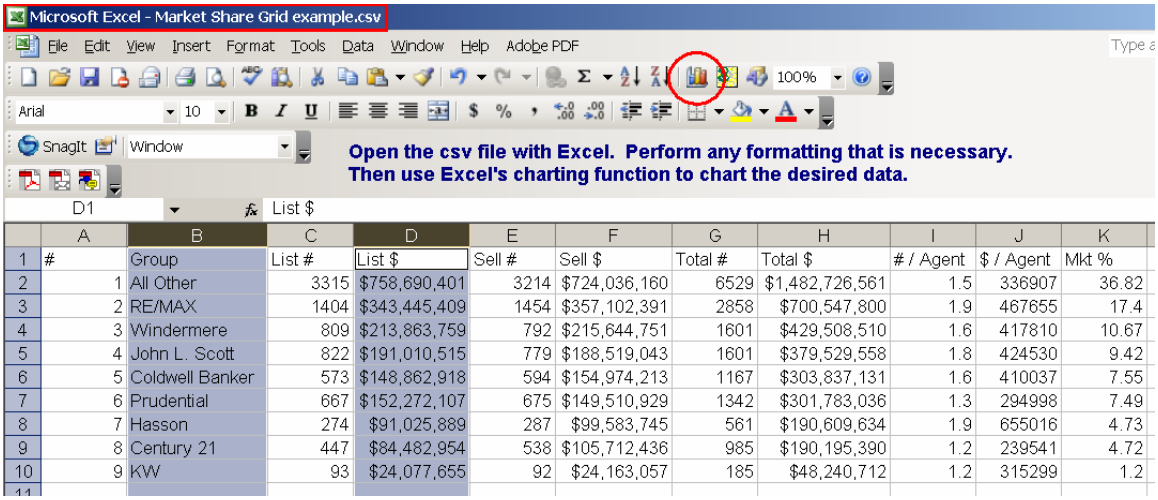
- On the File menu select Export
- Choose 'Market Share Grid'
- This creates a CSV file that you will be able to save to your computer
- Using this CSV file you can chart just the Listing Side of the market share data if that is what's desired.

The example (pictured above) is a named CSV file exported from BrokerMetrics®

- Excel can read the CSV file format.
  - To access the data, open Excel and in the File pull-down menu, select Open.

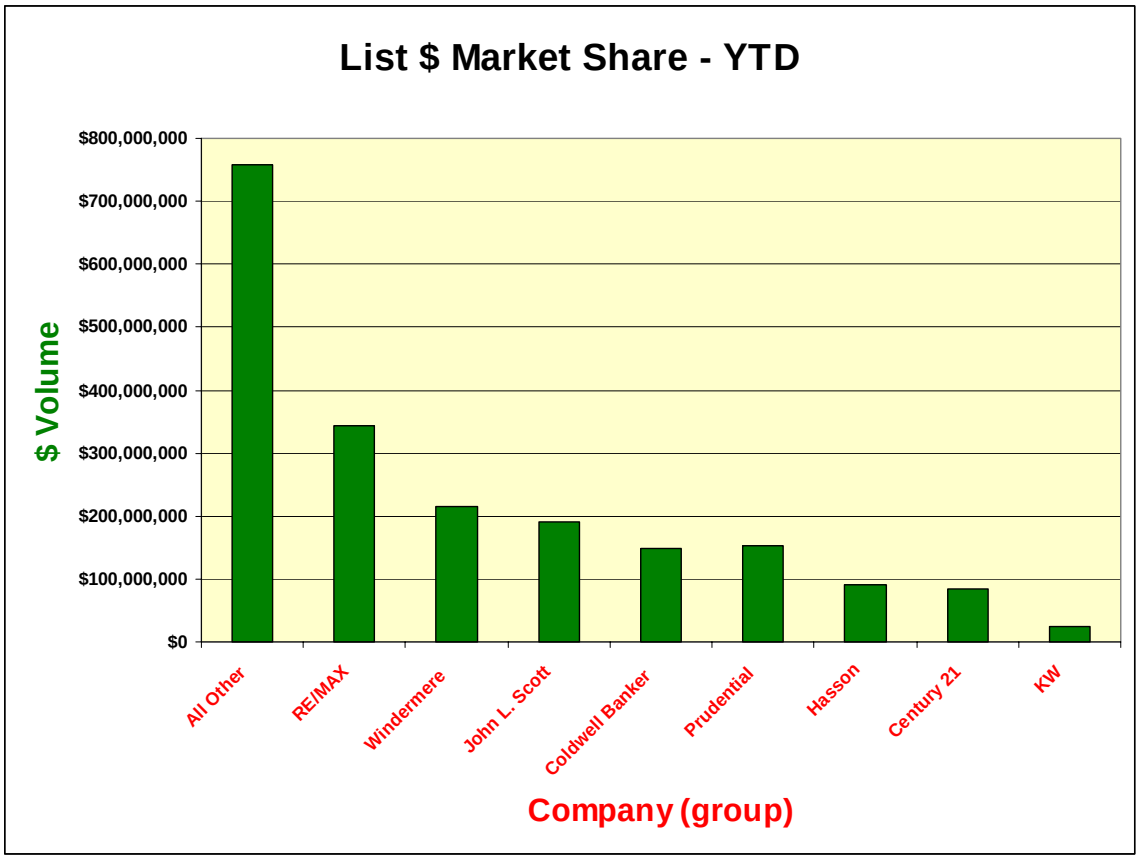
©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

- Browse on your computer to find the CSV file you created, then click Open.
- Once you have opened the file, you may need to format the data to create the chart and/or data table you desire.


Microsoft Excel - Market Share Grid example.csv
File Edit View Insert Format Tools Data Window Help Adobe PDF
Open the csv file with Excel. Perform any formatting that is necessary.
Then use Excel's charting function to chart the desired data.
D1
List $

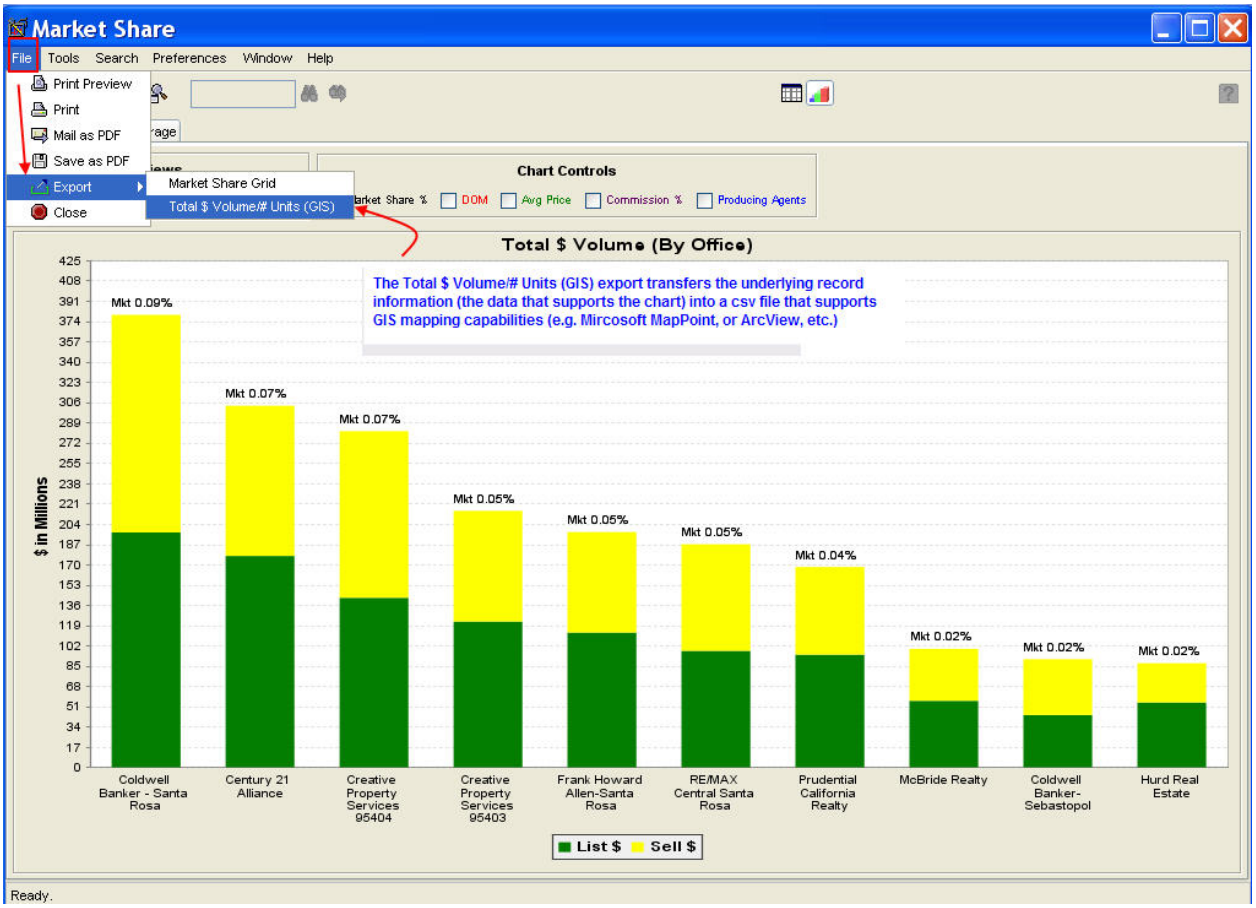
	A	B	C	D	E	F	G	H	I	J	K
1	#	Group	List #	List $	Sell #	Sell $	Total #	Total $	# / Agent	$ / Agent	Mkt %
2	1	All Other	3315	$758,690,401	3214	$724,036,160	6529	$1,482,726,561	1.5	336907	36.82
3	2	RE/MAX	1404	$343,445,409	1454	$357,102,391	2858	$700,547,800	1.9	467655	17.4
4	3	Windermere	809	$213,863,759	792	$215,644,751	1601	$429,508,510	1.6	417810	10.67
5	4	John L. Scott	822	$191,010,515	779	$188,519,043	1601	$379,529,558	1.8	424530	9.42
6	5	Coldwell Banker	573	$148,862,918	594	$154,974,213	1167	$303,837,131	1.6	410037	7.55
7	6	Prudential	667	$152,272,107	675	$149,510,929	1342	$301,783,036	1.3	294998	7.49
8	7	Hasson	274	$91,025,889	287	$99,583,745	561	$190,609,634	1.9	655016	4.73
9	8	Century 21	447	$84,482,954	538	$105,712,436	985	$190,195,390	1.2	239541	4.72
10	9	KW	93	$24,077,655	92	$24,163,057	185	$48,240,712	1.2	315299	1.2

- Then use Excel's charting function to create the presentation you desire (the chart below was created with Excel's Chart Wizard).



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.

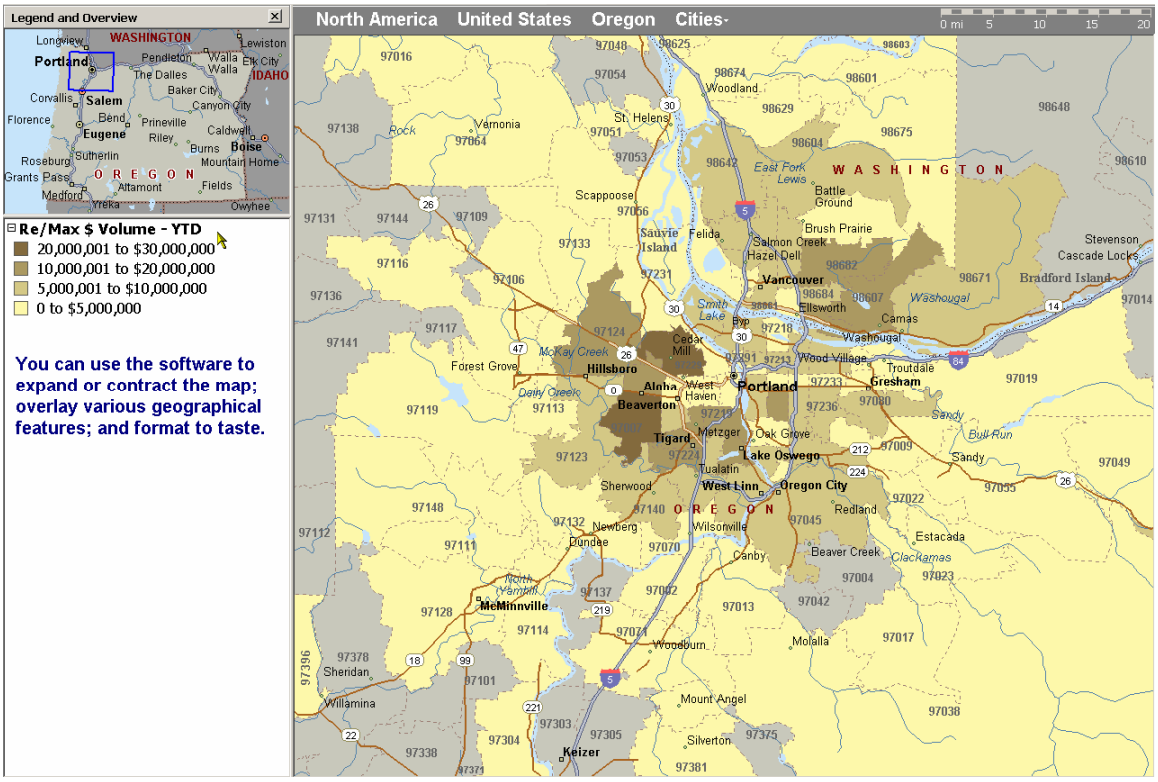
Market Share Totals – Total $ Volume/# Units (GIS) Export



- On the File menu select Export
- Choose 'Total $ Volume/# Units (GIS)'
- This creates a CSV file that you will be able to save to your computer
- Using this CSV file you can chart just the Listing Side of the market share data if that is what's desired. This export also creates a CSV file but this time it has GIS "handles" (e.g. zip codes) into the underlying data records. As a result, GIS mapping software (e.g. MapPoint, ArcView) can read and display the file information on a map.

- The example (pictured above) is a named CSV file exported from BrokerMetrics®.
- GIS software, like Microsoft's MapPoint (), can read the CSV file format. To access the data, open the application (e.g., MapPoint) and on the File menu, select Open.
- Browse on your computer to find the CSV file you created, click Open.
- Once you have opened the file, you may need to format the data to create the chart and/or data table you desire.
- The example below uses Microsoft's MapPoint (), to present the information in the following manner.

©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.



©Terradatum 2008. All rights reserved.
Patent Pending. BrokerMetrics® products include technology that is the subject of one or more pending U.S. Patent applications.